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ABSTRACT

This series of five booklets has been developed to provide Oregon public school district administrators with suggestions for cost containment and increasing productivity. The five sections focus on the following topics: (1) the problem of declining funds for schools and solution strategies; (2) cost-saving tips for district and school-level administration; (3) cost-saving tips in curriculum, instruction, vocational education, special education, student services, and media services; (4) cost-saving tips for support services (buildings and grounds, maintenance, pupil transportation, and food services); and (5) cost savings for community colleges. The fourth section features suggestions on energy conservation, use of buildings, maintenance of buildings, cleaning of buildings, grounds use and maintenance, and equipment use and maintenance. It also offers eight cost-saving ideas and two appendices. (AA)

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Managing Costs Creatively ($MC^{2)}$

Sections 1-5

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Managing Costs Creatively

Oregon Department of Education
700 Pringle Parkway SE Salem, Oregon 97310

Verne A. Duncan
State Superintendent
of Public Instruction

EF 005 560

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Spring 1982

FOREWORD

In public education the goal traditionally has been to provide high quality, effective programs at a reasonable cost to taxpayers. Now, however, we are experiencing a dramatic change that will probably affect education in Oregon for years to come: there simply is not enough money to continue in a "business as usual" manner.

In the past several years, school districts, education service districts and community colleges have considered a variety of cost-saving measures, some of which are successfully in use today. Others, previously put aside, now are being reexamined. Even changes in state laws and rules may need to be considered. While a given measure may seem unacceptable, all options should be considered in any analysis. Certainly, this is no time to reinvent the wheel, and we all stand to gain from those who have experience with a cost-saving idea.

The times demand that we take a fresh look at the way we operate--look for better ways--ask questions we have never had to ask. Yet arriving at creative solutions may be hampered by all-too-familiar obstacles: seeing only what we expect to see, being too close to a problem, a belief that money solves everything, resistance to change, and of course the traditions held sacred in our districts.

Since last December, when I initiated the Managing Costs Creatively (MC^2) Project, Department staff members have been collecting thoughts and ideas from local educators around the state. This MC^2 series of booklets is a compilation of those ideas. The ideas are NOT recommendations from the Department, the State Board nor the State Superintendent; they are offered by educators for consideration as potential ways to manage costs creatively. Some of the ideas may be helpful to you, others may not. Use what you can.

If you have additional ideas or resources to share with others, please send them to the MC^2 Clearinghouse at the Department. If you have comments or questions, call Don Egge, Associate Superintendent for Policy and Program Development, who is directing the MC^2 project. Telephone 378-8525, or toll free in Oregon 1-800-452-7813, ext. 8-8525.

Verne A. Duncan
State Superintendent
of Public Instruction

ACKNOWLEDGMENTS

The time and effort of all who contributed to the development of these MC^2 materials are gratefully acknowledged.

On April 5-6, 1982, a select group of retired Oregon administrators were asked to volunteer their time to help search for the most promising approaches to the fiscal crisis occurring in public education. Those attending were:

Herb Armstrong, Forest Grove
John Cermak, Rainier
Amo DeBernardis, Portland
Ed Ditto, Oregon City
Alta Fosback, Tigard
Wayne Foster, St. Helens
Errol Hassell, Tigard
Ewart Jewell, Bend
Stan Jobe, Ashland
George Martin, Salem
Lloyd Millhollen, Eugene
Owen Sabin, Milwaukie
Robert Sabin, Lake Oswego
Ed Sanford, Wilsonville
Wallace Turnidge, Salem

Meanwhile, a number of Department of Education staff members have contributed to this agency-wide priority effort. The following offices may be contacted for further information on given subjects:

Solution Strategies:	Office of Policy and Program Development
Administration:	Business Services Section Legal Personnel Services Section
Instruction:	Basic Education Section Compensatory Education Section Vocational Education Division Special Education Section Student Services Section Instructional Technology Section
Support Services:	Business Services Section Pupil Transportation Section School Nutrition Programs Section
Community Colleges:	Office of Community College Services

One resource which was particularly valuable to all who contributed to the MC^2 efforts was A Handbook for Coping with Decelerating Resources, published by the Colorado Department of Education (Boulder) in April 1981.

INTRODUCTION

This series of MC^2 booklets has been developed to provide school district administrators with the experience gained by others facing a decline in resources. Many of the suggestions offered in these pages bring about greater cost-effectiveness, and even improved productivity. The material is printed individually by section for the sake of economy, so that each section can be directed to appropriate district personnel.

Section 1 discusses the problem of declining funds for schools and solution strategies.

Section 2 lists cost-saving tips for district and school-level administration.

Section 3 lists cost-saving tips in curriculum, instruction, vocational education, special education, student services and media services.

Section 4 lists cost-saving tips for support services: buildings and grounds, maintenance, pupil transportation and food services.

Section 5 addresses cost savings for community colleges.

Some cost-saving ideas are described further at the end of each section and are listed in the Table of Contents on the following pages. If a suggestion seems appropriate to more than one area, it is presented more than once.

Furthermore, there are approaches to cutting costs that seem to apply to almost any program area. For example:

> Have you considered the skills of your staff outside the areas of their professional training? You may have access to good part-time carpenters, mechanics, etc., or those who could help with drama, music, archery, etc., because of hobbies or other work experience.
>
> Have you considered exchange/trade-off arrangements with local business or industry (e.g., free lunches for volunteers to work with handicapped children, businesses to provide on-site learning settings or "consultants" in exchange for use of school facilities for their employees in the evenings, etc.)?
>
> Networking--Have you considered different avenues of cooperative action between schools, between districts, through ESDs or regional cooperatives for sharing resources (mechanics, repair and maintenance contracts) and for group purchase of materials, supplies or commodities?
>
> Are you utilizing industrial arts classes for construction projects (bookcases, partitions, rebuilding or refinishing furniture)?
>
> Have you fully explored all angles of parent/volunteer involvement--garage sales, flea markets, donations, help as playground supervisors, helping locate used furniture or equipment from business or government offices where they are cutting back?

If you have questions or wish to speak with someone who has experience with a given idea, contact the Department for more information.

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SECTION 1

MANAGING COSTS CREATIVELY IN THE 1980s

The Problem Facing Public Schools

This is a time of economic crisis for Oregon's public schools. While in recent years school districts have found ways to adjust to less federal and state support, as well as some voter unwillingness to approve tax increases, there are indications that more adjustments will be needed before matters get better. The purposes of Section 1 of this MC^2 document are to survey current economic, social, and political factors which may affect public school resources and to suggest approaches which districts can take in an effort to maintain educational quality with fewer resources.

What We Know

A gap has been developing between rising educational costs and taxpayers' willingness and ability to pay; recent school levy defeats and national surveys bear this trend out. Coupled with the state's economic picture, the challenge to maintain educational quality becomes even greater. Here are some of the facts:

- The cost of public education in Oregon is increasing at a faster rate than the Portland Consumer Price Index. In the last ten years, the figure (for grades K-12) has gone from $523 million to $1.735 billion, an increase of 325 percent; money from local property tax levies has gone from $409 million to $1.204 billion, up 294 percent.* While federal and state spending has increased faster than spending at the local level, these two sources account for only 30 percent of the total in FY 1982.

  During the same period, the total cost per student has increased from $1,142 to $3,899, and the contribution of local property taxes grew from $875 to $2,707.** This has occurred despite the fact that average daily membership has remained relatively stable, showing a 4.7 percent decline (466,851 to 444,962) in ten years time. The statistics presented on page 1-4 illustrate these trends.

---

*Figure 1 shows the increase in revenues from federal, state, and local sources for the period 1972-82; Figure 2 compares this growth to the Portland Consumer Price Index (see page 1-2).

**Figure 3 (page 1-3) shows cost increases for specific programs and general school operations.

FIGURE 1
BUDGETED RESOURCES FOR EDUCATION (K-12)
FROM FEDERAL, STATE AND LOCAL SOURCES
(FY 1972 to FY 1982)

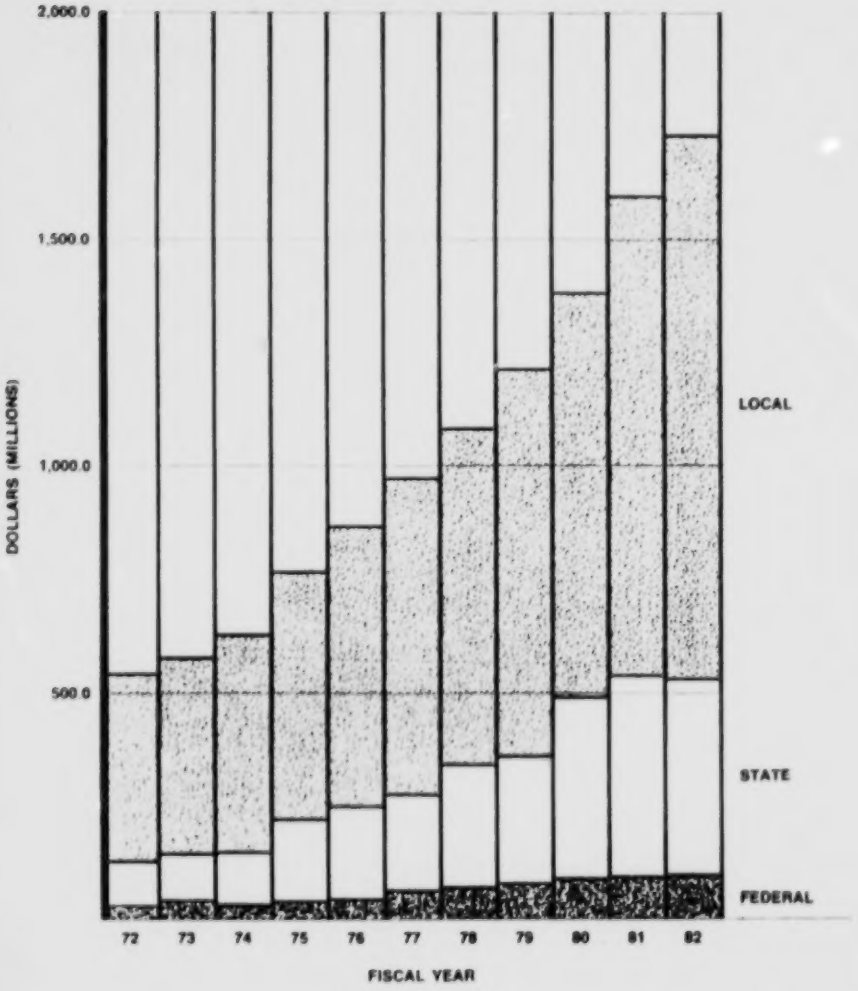

FIGURE 2
COMPARISON OF INCREASES IN BUDGETED RESOURCES
FROM FEDERAL, STATE AND LOCAL SOURCES
WITH PORTLAND CONSUMER PRICE INDEX
(FY 1972 = 100)

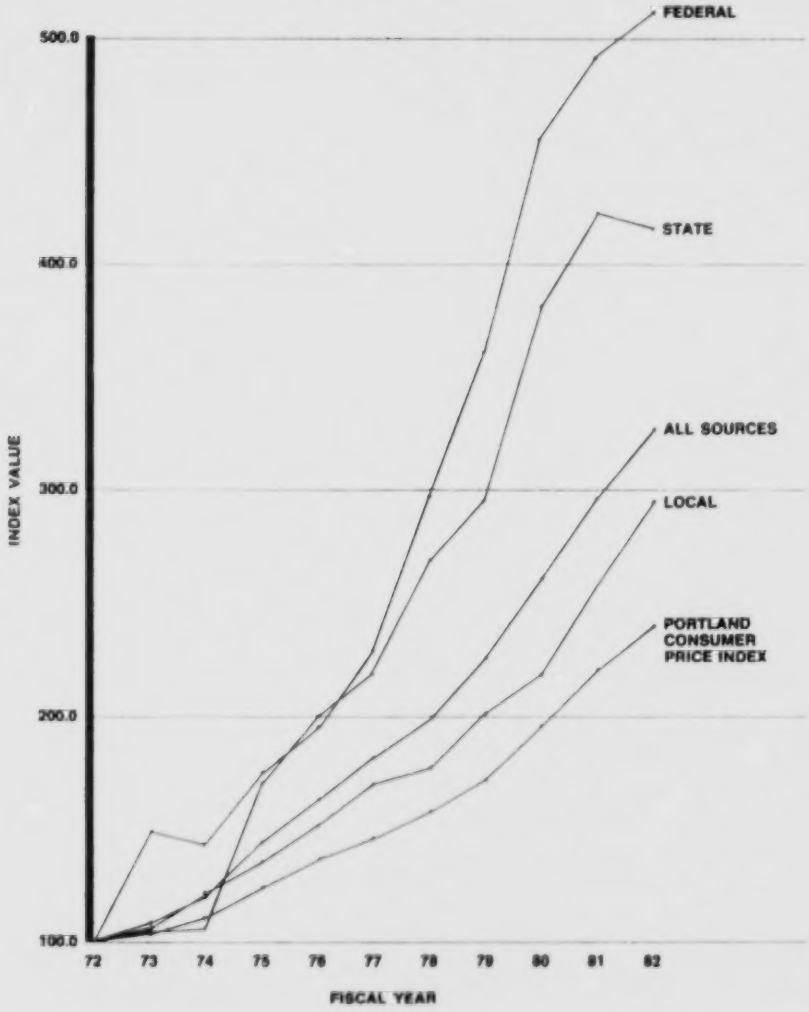

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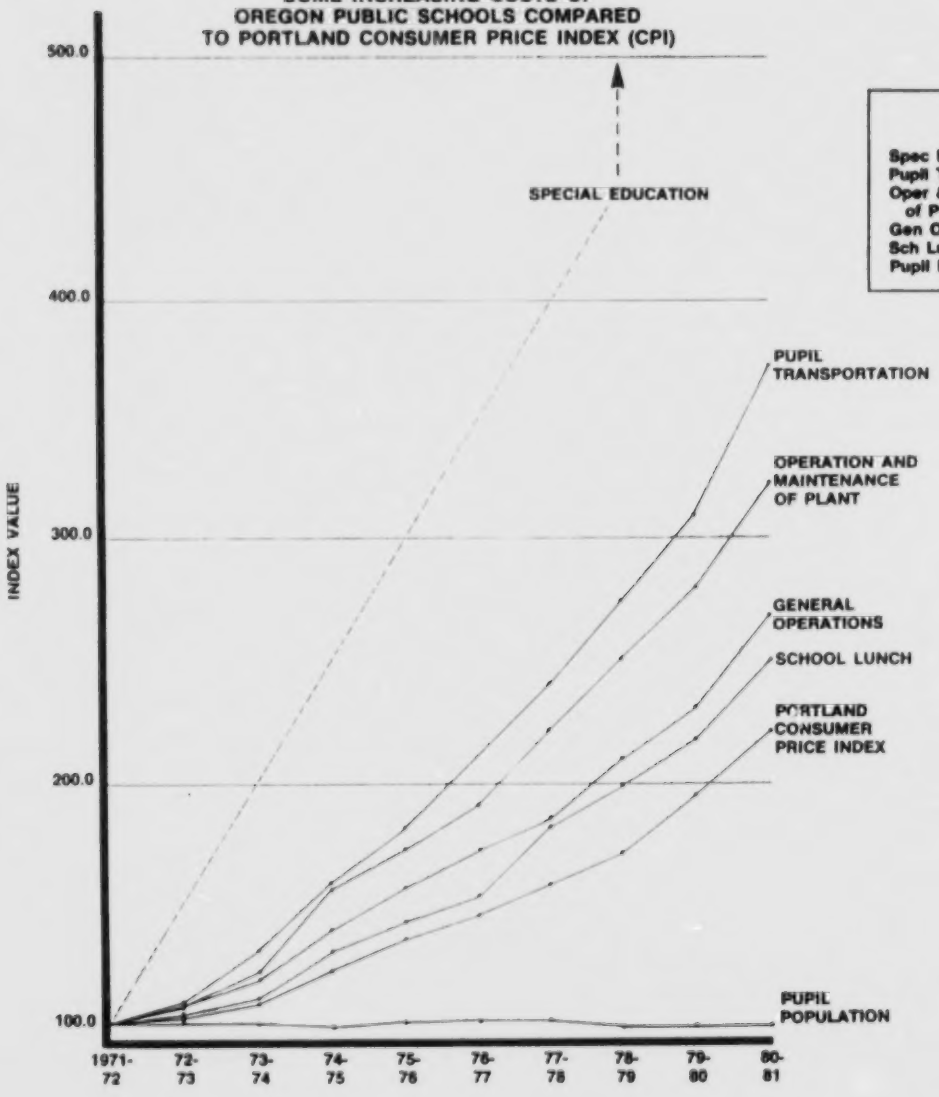
FIGURE 3

SOME INCREASING COSTS OF OREGON PUBLIC SCHOOLS COMPARED TO PORTLAND CONSUMER PRICE INDEX (CPI)



	1971-72	1980-81
Spec Ed	$ 8,000,000	$ 94,935,343
Pupil Trans	17,688,254	65,261,213
Oper & Maint of Plant	54,843,095	178,076,097
Gen Oper	461,340,790	1,231,064,834
Sch Lunch	23,585,845	59,247,244
Pupil Pop	498,686	489,786

Index of Increasing Costs based on Portland CPI, with base year 1971-72 = 100

1980-81 index value = 1085

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Area of Cost Increase	1972	1981
Number of handicapped students served	22,734	45,149
Number of special education teachers	769	2,861
Number of students transported	249,962	250,243
Number of student transportation miles	29,708,000	42,000,000
Cost of one school bus	$10,500	$30,000
Average cost of gasoline per gallon	$ 0.19	1.04
Average teacher salaries	$ 9,258	18,010
Number of certificated staff	27,245	31,041
Number of school meals served to students	39,954,267	43,986,578

- National surveys indicate that public attitudes regarding the quality of public schools are becoming increasingly negative. The annual Gallup Poll of the Public's Attitudes Toward Public Schools* has asked people to rate schools on a scale A-F. In 1981, 9 percent of the sample gave schools an "A" rating, compared to 18 percent in 1974; almost half rated schools "C" or "D" in 1981, in contrast to 27 percent in 1974. Respondents living in the west rated their schools lower than those living in other parts of the country--

Percentage of Responses
(1981 Survey)

Rating	Western States	National Sample
A	5%	9%
B	23	27
C	38	34
D	16	13
Fail	10	7
Don't know	8	10

When asked about the biggest problems facing public schools, the following were mentioned most frequently: lack of discipline (23%), use of drugs (15%), poor curriculum/poor standards (14%), lack of proper financial support (12%), difficulty getting good teachers (11%), and integration/busing (11%).

- Nationally, opposition to raising local property taxes to support public schools is increasing. In the Gallup surveys for 1969, 1970, 1971, 1972, and 1981, people were asked whether they would support substantial tax increases for local public schools; survey results are displayed on the next page in percentages.

*Information from the annual Gallup surveys reported here was published in the Phi Delta Kappan, 63 (1), September 1981.

Survey Year	In Favor	Opposed	Don't Know
1969	45%	49%	6%
1970	37	56	7
1971	40	52	8
1972	36	56	8
1981	30	60	10

Reasons for opposing tax increases in 1981 included:

- Much of the money now spent on the schools is wasted.
- Taxes are already too high/can't afford more.
- Teachers are not doing their job/shouldn't get increases.
- Schools have a poor performance record.

A national survey may not precisely reflect the attitudes of Oregonians, but it does reflect a general decline in confidence in the efficiency of public schools.

- The health of Oregon's economy has suffered in the past three years. While personal income increased at an annual rate of 11.4 percent during the late 1960s and 1970s (in current dollars), it leveled off in 1979 and 1980, with actual "purchasing power" declining due to inflation.

Business activity has dropped substantially in many sectors of the economy. The following figures are for the twelve-month period ending winter 1982:

Economic Indicator	% Change
Gasoline sales (gallons)	-11.2%
Trucking (weight-mile tax receipts)	-14.4
Business incorporations (new filings)	-16.7
Shipping (total tonnage, Port of Portland)	-17.2
Automobile sales (new passenger cars)	-23.8
Lumber production (western softwood, board feet)	-30.4
New single family homes	-53.8
New multiple housing units	-65.3
Portland area real estate sales	-73.1

(Source: Oregon Business, March 1982)

Unemployment statewide has increased sharply, rising four percentage points (8.7% - 12.7%) between January 1980 and January 1982; in 17 of the state's counties, the rate exceeded 15 percent as of January 1982.

- Voter approval rates in Oregon school finance referenda are decreasing. Through the 1970s, an average of 74 percent of the districts passed their budgets on first submission to voters and 16 percent passed the second time around. From calendar year 1980 to 1981, however, the success rate for initial submissions dropped 15 percent, reaching the lowest passage rate in the 14 years that the Department of Education has kept these statistics. (See Table 1, page 1-15.)

Counties having an unemployment rate of less than 8 percent averaged 55.1 percent "yes" on "A" levies, compared to 48 percent in counties where unemployment was 14 percent or higher. The corresponding "yes" vote percentage for "B" levies was 48.9 percent, as opposed to 41.3 percent. (Table 2, page 1-16, shows the relationship between the county unemployment rate and the percentage of "yes" votes on initial "A" and "B" levy measures in 1981.) It can be argued that the fear of unemployment strongly influences purchasing decisions, and the "purchase" of education via property taxes may be easily foregone by those who are unemployed or who fear they will be.

The relationship between economic uncertainty and voter approval seems to be a major factor for 1982 school district money requests. At the March 30 election, 59 of 82 (72%) levy requests were rejected and on May 18, 100 of 126 (79%) tax base requests and school levies were not approved. Community colleges experienced an 80 percent rejection rate in March and 100 percent rejection of measures in May.

What We Believe

In addition to the foregoing factual indicators, there is other evidence pointing to increasing difficulties in maintaining current resource levels. The points which follow were suggested by a seven-member group* convened at the Department's MC^2 Workshop held on April 5 and 6, 1982.

- The public's perception of school effectiveness is often based on fragmentary and sometimes inaccurate evidence. People often make judgments about public schools on the basis of little evidence, seeking reinforcement of their current perceptions of schools. Too, media coverage has in many ways reinforced the idea that schools are failing. One indication of such media influence can be seen in the 1981 Gallup Poll: 36 percent rated schools in their own community "A" or "B," but only 20 percent rated schools this well nationally. Similarly, those with children in public school gave higher grades than those without--46 percent as opposed to 31 percent. In both cases, it is likely that local sources of information offset press criticism at the national level.

- In general, the public has incomplete knowledge of school budgets and the school budgeting process. Low turnout at district budget hearings and board meetings, along with little budget coverage in the media, would suggest that school patrons generally are uninformed about the costs of the programs which they are buying. This knowledge vacuum may then be filled with hearsay and supposition. When, for example, additional resources are "found" after a levy defeat, the district's credibility is undermined and more speculation results.

*The group included two retired school superintendents and five Department of Education staff members.

A school board and administration may wish to keep a low profile when developing a budget, perhaps thinking that high voter turnout will mean the defeat of budget measures. However, recent research has indicated that low turnout does not necessarily mean levy success.* Thus, there is little reason to discourage broad citizen participation in the budgeting process.

- Taxpayers feel that they have little control over economic factors which directly affect their well-being (e.g., inflation, job security, interest rates, and taxes). Voting against property tax increases is one of the few ways in which taxpayers can express those feelings.

- As long as present trends continue, the proportion of federal and state support for education will diminish, and public schools will depend to a greater extent on local resources.

- In the face of rising costs for education, taxpayers are more likely to demand evidence that educational quality is also increasing. With per-pupil costs rising at a faster rate than the costs of other products and services (Figure 2), taxpayers want to know if they are getting what they are paying for. As productivity becomes more of an issue, the public is asking for either curtailment of school resources or more performance-based accountability and evidence of productivity improvement on the part of schools. The result could be a narrowing of the schools' mission with a greater focus on ways to economize on the costs of education.

Selecting Solution Strategies

Increasing costs, declining public confidence in school effectiveness, and the local and statewide effects of an economic recession pose an unprecedented challenge for schools in maintaining quality programs and services. Some overall issues in planning during periods of declining resources are discussed below.

Analyzing the Situation

The first order of business in budget planning is to determine the extent of the problem in meeting district resource needs. Typically, a school district and its community "negotiate" an acceptable rate of revenue increase based on several years experience with school levy measures. However, when such factors as unemployment, local economic growth and community conflict over education change dramatically, a district may find that the traditional level of voter support has also changed. Negotiation may then be compressed into a series of repeated levy elections. Adequate planning and a realistic analysis of the situation, however, may help to ensure that school boards and administrators submit levies which are approved without repeated failures.

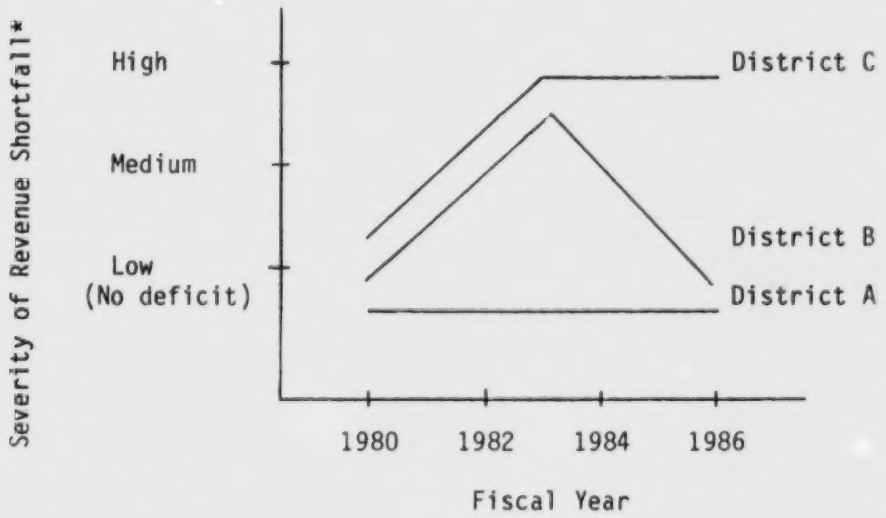
---

*Piele, P. K., "Public Support for Public Schools: The Past, the Future, and the Federal Role." Paper prepared for the U.S. Department of Education, July 1981. Available from the Center for Education Policy and Management, University of Oregon; cost $2.

In analyzing its present and projected fiscal situation, a district may find it useful to describe the anticipated balance between income and budget needs. The three hypothetical districts illustrated in Figure 4 face altogether different planning agendas. District A expects to maintain a balance between income and expenditures needed to sustain current programs. District B, on the other hand, foresees a short-term deficit (necessitating immediate expenditure cuts) but a return to current revenue levels over the long term (adjusted for inflation). District C must make budget cuts immediately which are not likely to be restored within the next four to five years. Each of these fiscal projections has distinct implications for the way in which the budget is adjusted (see further discussion under the heading, "Analyzing Cost-Cutting Alternatives").

Figure 4

Hypothetical Projections of Revenue Adequacy



*Shortfall = Percentage discrepancy between resources actually received (or anticipated) and resources needed to maintain current programs and services.

A large number of variables determine a district's budget, many of which cannot be predicted with any certainty. However, knowledge (or at least estimates) of the following will help clarify the financial picture beyond the immediate future:

- Future student enrollment by grade.
- Demographic, economic and political trends at the local level affecting voter willingness to approve property tax increases, requests for salary increases, nonpersonnel costs, attitudes toward school closure.

- General economic and political trends at the state level affecting Basic School Support, property tax relief, grant-in-aid programs, timber revenues, property tax limitation initiatives, etc.
- Trends in the level and method of federal support for education.

While future costs and income cannot be pinpointed on the basis of such factors, a range of "best" to "worst" estimates will make contingency planning possible.

Budget Development Considerations

Since no two school districts are alike, there are few solutions to budget problems which apply equally across all districts. But there are a number of cost-cutting measures from which to choose. These need to be analyzed and weighed carefully before they can be translated into an operating budget. This process of resolving budget concerns may occur in five suggested stages: setting ground rules and policies, involving staff and community, examining cost-cutting alternatives, presenting options to the governing board, and evaluating the impact of budget reduction.

1. Setting Ground Rules

Clear budget reduction policies need to be established in advance specifying the responsibilities of the school board, budget committee, superintendent, central administrative staff, building principals, teachers, and citizen advisory committees. Each group's involvement should be understood in advance. Other policies to establish might include:

- the board's overall educational goals and priorities;
- the preferred mix of instruction, support and administrative functions;
- policies on class size;
- support for special student populations such as talented and gifted, handicapped and non-English speaking students;
- priorities regarding extracurricular activities;
- provisions for student transportation;
- support for continuing staff development;
- goals for curriculum improvement.

Communication on such matters helps set the stage for coherent long-range planning.

2. Involving Staff and Community

Staff and community expect, sometimes demand, to know how and why some budget decisions are made, and they want to be involved in making the decisions. Involvement of both groups is likely to bring the following advantages:

- Increased awareness and understanding of school matters--an informed staff and community will help the district make sound decisions.

- Increased support--people support decisions more when they help make them.
- Enhanced student achievement and attitudes toward school--students tend to achieve more and place a higher value on learning when parents get involved in school.
- Improved staff morale--when the community gets involved in schools, it is likely that staff morale will improve.
- Greater creativity in solving budget problems--school administrators' "blind spots" may be overcome when staff members and citizens take part.

With open lines of communication and broad-based input, administrators can help to ease tensions which may arise when difficult decisions have to be made. When working with district staff:

a. The superintendent should meet with union leadership as soon as practicable to explain the financial crisis. Suggest that they look at negotiated contracts to see if some changes could help reduce costs. Reasssure the unions that no unilateral action is contemplated.

b. Set forth any legal, contractual or state standards compliance limitations which may affect budgeting. Make clear the extent to which these factors can be negotiated.

c. Inform and involve all segments of the staff--building level administrators, professional staff, support and maintenance staff, bus drivers. Establish study groups to analyze suggestions, set priorities among those suggestions, draft impact statements, and make recommendations.

To involve the community:

a. Establish study groups in the community or utilize existing ones (e.g., local school/PTA committees, special task forces, district advisory councils) to analyze ideas and make recommendations. Provide them with all available data. Ask staff members to serve as resource personnel, giving their views on the probable impact of various proposals made by the groups.

b. Survey the community regarding educational priorities and utilize the results when making decisions.

c. Organize local school advisory committees to serve as liaison among community, school-level administrative and school board interests.

d. Install a district telephone "hotline" number that citizens can call for answers to their questions. The hotline should be open on a daily basis, and the personnel who answer calls should be fully informed of the most recent budget and policy decisions.

e. Keep the public informed through the media, meetings and district newsletters; provide two-way communication as much as possible.

f. Explain fully the reasons for increases in budget costs which exceed what might be expected due to inflation or growth.

g. Identify per pupil costs for major areas of instruction, services and student activities. Per pupil costs are easier to grasp (and compare) than total program budget figures.

h. Prepare "visuals" (graphs, charts, tables, transparencies, etc.) for presentation to study groups and the general public.

i. Pool recommendations from all sources and prepare an administrative recommendation to the school board; present the recommendations to the board at a well-publicized meeting.

j. Hold hearings to invite responses from staff and the general public, then revise original recommendations accordingly.

k. Make board decisions at well-publicized meetings. Budget committee members should be included in all presentations to the board; however, the board is responsible for making the final decisions.

Involving the staff and community in budgeting has many advantages, and the media are more likely to support budget efforts if it is perceived that a substantial effort has been made to be honest and open. However, staff and community need to be involved early on--not as an afterthought. Merely asking for their reactions once the superintendent's budget recommendations have been presented to the board casts doubt on the district's sincerity in involving staff and the community.

In this regard, follow-up also is important--those involved want to know how their recommendations were acted upon. Letting them know that their involvement is valued builds support for the district.

3. Examining Cost-Cutting Alternatives

The next order of business is to examine available alternatives. Measures which have been taken by school districts and other public service agencies tend to fall into a pattern, ranging from most to least desirable:

Level 1 Increase productivity. The district may decide to enlarge class sizes, coordinate or consolidate similar functions within the district or with other districts (in such areas as purchasing, transportation, or media programs), use instructional television to meet certain instructional needs, economize (on supplies, electricity, etc.) or in other ways bring about greater cost-effectiveness.

Level 2 Defer spending. The district may "make do" for the time being on such matters as maintenance and capital purchases. These decisions must be made with care, to avoid expenses in the future which would be unnecessary if sound preventative measures were to be taken now.

Level 3 Reduce services by cutting program budgets equally. "Across the board" reductions in spending might be sufficient to solve the budget problems; each program administrator would be required to find a way to cut back a given percentage--somewhere. By spreading relatively small cuts across the entire organization, nearly the same level of quality can be maintained.

Level 4 Eliminate "nonessential" services. Rather than force deeper cuts across all programs, a district may decide to do without certain programs or services altogether. Certain athletic programs, staff support services, school food service, student transportation, etc., might fall into this category.

Level 5 Eliminate or drastically reduce positions, programs, and services. After most other options have been exhausted, professional staff reduction remains as a last resort.* Options to consider include: voluntary agreement to take unpaid furloughs, reducing the work week to four days, eliminating staff positions, or in some other way trimming salary costs. Other severe alternatives are school closure and instructional program elimination.

The above measures are not meant to be taken sequentially in every case (i.e., first exhausting all options in Level 1, then moving on to Level 2, etc.) Neither should all programs necessarily be reduced in the same manner (i.e., applying Level 5 measures equally across all instructional programs). When deciding where and how deeply to cut, the following factors should be considered:

- the total budget savings required to balance anticipated income and expenditures,
- the long-term expectations for federal, state, and local revenues,
- the district's history of cost-cutting measures which already have been implemented in each program area,
- the impact of future budget cuts on program effectiveness, and
- priorities expressed by the board, administration, staff, and community regarding the importance of each program area.

The need to consider the first factor is clear; the need to weigh the remaining four is discussed below.

Long-Term Revenue Projections. Recalling Figure 4, districts will vary in their projections of long-term financial health. District B, which anticipates an eventual return to current revenues, might rely on Level 2 (deferred spending) alternatives. District C, with little expectation of future budget restorations, might emphasize Level 3 (across the board) options. Similarly, when it comes to cutting staff positions, District B may decide to abolish positions which can be reestablished without extensive training and orientation (or which are easily filled). If declining resources are likely to be a continuing problem, such considerations are not as relevant. Again, this thinking also applies to programs--other factors being equal, those programs which can be rebuilt more easily without sacrificing quality might be cut first; those that would take years to reestablish might be protected.

The district's long-term financial picture also might affect the number of cost-cutting alternatives which are considered. For example, if a district expects deficits over the next two or three years, budget cuts

*A useful resource is Reduction in Force--Layoff and Recall, 1981, developed by the Personnel Management Advisory Committee, Oregon Department of Education.

beyond those needed to balance the coming year's budget should be analyzed. Attention should be focused on reductions needed for the duration--not only as an exercise in contingency planning, but also to help guide current budget deliberations. Some programs may be able to absorb successive budget cuts better than others; that is, there may be programs which might have to be cut completely due to the fact that their entire effectiveness depends on maintaining funding at the present level. Or, if such a program is essential, it might best be spared with incremental reductions applied to other program areas.

The danger in basing budget decisions on the long-term financial outlook is that revenue projections might be inaccurate. The legislature may decide to alter the method of financing public schools or the economy may recover faster than expected. A long-term projection applied to current costs and revenues is only one of many factors to be considered.

Prior Budget Cuts. The district's history of cost-cutting measures directly affects current alternatives. If the district already has used the first three levels of options described earlier, the only recourse may be to eliminate programs and staff. After two or three years of budget cutting, the original set of priorities may have been forgotten, and a new set, reflected in the reduced budget, may have become the norm. Some programs or services may have been reduced more than others, and if this is not acknowledged, additional cuts may not reflect the policies in effect when retrenchment began.

Impact on Program Effectiveness. There are a number of ways to estimate the potential impact of cuts on the quality and effectiveness of school programs. "Cutback impact statements" can help to organize information (including opinions and perceptions) about the consequences of a given reduction, showing clearly what is being sacrificed.

An impact statement might include:*

- A general description of the cutback proposal,
- The number of students involved and how they are affected,
- The number of staff involved and how they are affected,
- The consequences (advantages and disadvantages),
- Possible effect on other programs or services,
- Legal implications (e.g., regarding state standards, PL 94-142),
- Dollars saved.

The "Cost-Saving Ideas" included in Sections 2 through 4 of this MC^2 series present general impact statements regarding selected cost-cutting measures. In a district's own impact analyses, the same format might be followed, utilizing more specific information.

---

*These are suggested by J. C. Hefty, University of Denver, in A Handbook for Coping With Decelerating Resources. (Denver, CO: Colorado Department of Education, 1981), p 241.

Priorities. Setting priorities lies at the heart of the matter in adjusting school budgets.* The board's policies on overall educational goals for the district can serve as a starting point from which more specific priorities can be developed. Other avenues for setting priorities include the following: (1) conduct community and staff surveys, asking for rankings of specific cost-cutting alternatives; (2) seek wide citizen and staff participation in discussing and recommending cuts to the superintendent and budget committee; and (3) examine available needs assessment data.

4. Presenting Options to the Governing Board

The superintendent and budget committee must weigh the alternatives available and present them to the board. The following information should be included: (1) an impact statement that indicates the consequences of eliminating a given item, (2) the amount of money saved, (3) the superintendent's rationale for recommending the items for elimination, (4) recommendations of study groups or advisory committees, and (5) any relevant survey or needs assessment data.

5. Evaluating the Impact of Budget Reduction

The study of changes in program effectiveness and productivity following budget cuts will provide useful information for future budget decisions. Ideally, the district should keep baseline data on key indicators of school effectiveness and productivity. Knowing about changes in such indicators will be helpful in decision-making. Districts may wish to share ideas, data collection instruments, sample evaluation studies, and tips on using evaluation data in the budgeting process.

Summary

Districts will vary in the extent of their financial problems and in the solutions they apply to those problems; for some, it will be "business as usual," others will need to cut staff and programs. The ideas presented in Sections 2-4 of this MC^2 document are intended to cover a broad range of possibilities, and any number of planning approaches may be needed. There are no "prepackaged" answers.

The Chinese symbol for "crisis" is a combination of the characters "danger" and "opportunity." While cutting budgets is difficult and often painful, in a very strong sense it also presents an opportunity for new approaches to thinking, and it can serve as a catalyst for drawing the community and school together. Finding the balance between expedient short-term remedies and long-term solutions places great demands on the creativity and leadership abilities of all involved.

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*Several excellent articles have addressed priority-setting issues. See, for example, Doherty, V. and J. Fenwick, "Can Budget Reduction be Rational?" Educational Leadership, 39.(4), January 1982, pp 252-257.

Table 1

Oregon School Financial Referenda, 1980 and 1981
Voter Response to "A" Ballots (1st Submission)

	Year Referenda Were Submitted to Voters*		
	1980	1981	
Number of Districts Submitting "A" Levies	211	176	
Percentage of Successful Referenda (1st Submission)	76.3%	61.3%	
Average District Percentage of "Yes" Votes (each district's percentage weighted equally)	58.1%	52.8%	
Statewide Percent of "Yes" Votes (Total "Yes" Votes/ Total Votes Cast)	53.9%	53.4%	(includes Portland)
		50.6%	(excludes Portland)

*The 1980 levies were for the 1980-81 budget year; 1981 levies were for the 1981-82 budget year.

Table 2

Relationship Between Unemployment Rate and Percentage "Yes" Vote on Initial Submissions of "A" and "B" Levies--1981 Referenda

Unemployment Rate**	Counties Included	Average Percentage "Yes" vote* "A" Levies	"B" Levies
Less than 8.0%	Benton, Clackamas, Gilliam, Morrow, Polk, Sherman, Washington	55.1%	48.9%
8.0 to 9.9	Lincoln, Malheur, Marion, Multnomah, Umatilla, Yamhill	55.8	49.6
10.0 to 11.9	Clatsop, Columbia, Jefferson, Lane, Tillamook, Union, Wasco	51.1	48.7
12.0 to 13.9	Baker, Hood River, Jackson, Klamath, Linn, Wheeler,	49.5	45.2
14.0 and above	Coos, Crook, Curry, Deschutes, Douglas, Grant, Harney, Josephine, Lake, Wallowa	48.0	41.3

*Total "Yes" vote divided by number of votes cast (x 100).
**Average county rate unemployment rate, January-April 1981.

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Section 2

Managing Costs Creatively

Oregon Department of Education
700 Pringle Parkway SE Salem, Oregon 97310

Verne A. Duncan
State Superintendent
of Public Instruction

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Federal law prohibits discrimination on the basis of race, color or national origin (Title VI of the Civil Rights Act of 1964); sex (Title IX of the Educational Amendments of 1972 and Title II of the Vocational Education Amendments of 1976); or handicap (Section 504 of the Rehabilitation Act of 1973) in educational programs and activities which receive federal assistance. Oregon laws prohibiting discrimination include ORS 659.150 and 659.030. The State Board of Education, furthermore, has adopted Oregon Administrative Rules regarding equal opportunity and nondiscrimination: OARs 581-21-045 through -049 and OAR 581-22-505.

It is the policy of the State Board of Education and a priority of the Oregon Department of Education to ensure equal opportunity in all educational programs and activities and in employment. The Department provides assistance as needed throughout the state's educational system concerning issues of equal opportunity, and has designated the following as responsible for coordinating the Department's efforts:

Title II--Vocational Education Equal Opportunity Specialist

Title VI and Title IX--Equal Education and Legal Specialist

Section 504--Assistant Superintendent, Special Education and Student Services Division

Inquiries may be addressed to the Oregon Department of Education, 700 Pringle Parkway SE, Salem 97310 or to the Regional Office for Civil Rights, Region X, 1321 Second Avenue, Seattle 98101.

INTRODUCTION

This booklet is part of a series entitled, Managing Costs Creatively (MC^2). The series has been developed to provide school district administrators with the experience gained by others facing a decline in resources. Many of the suggestions offered in these pages may bring about greater cost-effectiveness, and even improved productivity. They should not be construed, however, as recommendations from the Department, the State Board nor the State Superintendent.

The material is printed individually by section for the sake of economy, so that each section can be directed to appropriate district personnel. Section 1 discusses the problem of declining funds for schools and solution strategies. Section 2 lists cost-saving tips for district and school-level administration. Section 3 presents cost-saving tips in curriculum, instruction, vocational education, special education, student services and media services. Section 4 lists cost-saving tips for support services: buildings and grounds, maintenance, pupil transportation and food services. Section 5 addresses cost savings for community colleges.

Some cost-saving ideas are described further at the end of the section and are listed in the Table of Contents on the following page. If a suggestion seems appropriate to more than one area, it is presented more than once.

Furthermore, there are approaches to cutting costs that seem to apply to almost any program area. For example:

> Have you considered the skills of your staff outside the areas of their professional training? You may have access to good part-time carpenters, mechanics, etc., or those who could help with drama, music, archery, etc., because of hobbies or other work experience.
>
> Have you considered exchange/trade-off arrangements with local business or industry (e.g., free lunches for volunteers to work with handicapped children, businesses to provide on-site learning settings or "consultants" in exchange for use of school facilities for their employees in the evenings, etc.)?
>
> Networking--Have you considered different avenues of cooperative action between schools, between districts, through ESDs or regional cooperatives for sharing resources (mechanics, repair and maintenance contracts) and for group purchase of materials, supplies or commodities?
>
> Are you utilizing industrial arts classes for construction projects (bookcases, partitions, rebuilding or refinishing furniture)?
>
> Have you fully explored all angles of parent/volunteer involvement--garage sales, flea markets, donations, help as playground supervisors, helping locate used furniture or equipment from business or government offices where they are cutting back?

If you have additional ideas or resources to share with others, please send them to the MC^2 Clearinghouse at the Department. If you have comments or questions, call Don Egge, Associate Superintendent for Policy and Program Development, who is directing the MC^2 project. Telephone 378-8625, or toll free in Oregon 1-800-452-7813, ext. 8-8525.

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SECTION 2

ADMINISTRATION*

District Administration

District and school administrators are taking steps to reduce costs and balance their budgets, some of which are listed here. In the next few years, it may become necessary to reconsider a number of short- and long-range measures which, until now, have been used only selectively. Ideas to consider:

1. Recover more of the direct costs for such programs as school lunch, interschool activities, special electives, adult education and evening activities.

2. Extend the school day and reduce the week to four or four and one-half days. (No substitutes for coaches.)

3. Reduce the number of administrators through multiassignment. (See page 2-5 for more discussion of this idea.)

4. Organize schedules so that specialized staff can work in two or more buildings.

5. Develop a well-planned reduction in force policy, which will allow for the transfer of staff to improve pupil-teacher ratios in specialized areas.

6. Consider closing school buildings not needed. Research, develop criteria, establish procedures for closure.

Business

To obtain the best possible value for each taxpayer's dollar, districts could contract for services. However, if the district staff can provide a service at less cost, a contract would not be warranted.

1. Contracting Services. Responsibility for building and grounds maintenance, food service operations, transportation, custodial services, insurance, computer applications, etc., can be considered for private contracting, or obtained through education service districts.

   - Prepare bidding specifications carefully.
   - Prepare cost studies for use in making cost comparisons.

---

*Some of the measures listed here are discussed in more detail under "Cost-Saving Ideas," pp 2-11 to 2-13.

- Termination clauses provide protection from poor service or loss in financial support as a result of levy failures, or federal/state revenue reductions.
- The district's labor agreements must allow for such contracting.

2. Insurance. Money often can be saved by bidding for insurance, and almost all types of insurance can be bid successfully.

   - Prepared specifications are key to successful bidding.
   - Consultants can help reduce risks, losses, and costs.
   - Be sure that insurance possibilities are not restricted by employee bargaining agreements.
   - Local agents and firms should not be given preference.

   Some districts (or a consortium) may consider self-insurance.

3. Computers. Computerization of business services is new to many school districts.

   - Computers for business can be used to some degree by districts of any size.
   - Oregon Total Information System (OTIS) services are available to most districts at reasonable costs.
   - Beware of software limitations before buying or leasing any data processing hardware.
   - The computer programs developed by some districts for scheduling transportation maintenance have improved cost-effectiveness.

4. Improve the management of cash flow from all sources.

   - Lower the number of "idle fund" days.
   - Increase cash flow monitoring (minicomputers, charts).
   - Improve investment policies and practices.
   - Demand district money held by the county.

5. Increase cooperative business functions; decrease the number of staff working on business functions. Watch for duplicate accounting systems in district programs.

6. Expand the use of regional purchasing for supplies, equipment and vehicles.

   - Use disposable items (mops, filters, etc.)

7. Establish a multiyear capital improvement plan.

   - What can be put off now?
   - What will the costs be later if put off now?

8. Look to the Business Task Force on Education Recommendations (1969) as a resource.

Note: The Public Contract Review Board rules apply to the sale of public property just as they do to purchasing. Accordingly, for any item valued at $500 or more, a district must try to obtain three quotes; on items less than $500, quotes are encouraged.

Personnel

Ideas which increase revenue, productivity or efficiency--

1. Utilize staff development and training to prepare current employees for new or added responsibilities. (See Cost-Saving Idea #3, Page 2-12.)

   - Train district staff to serve in staff development roles.
   - Train teachers for new positions by providing inservice, graduate course reimbursement, etc.

2. Invite bargaining units to participate in cost cutting through "quality circles"--small groups of employees who meet to discuss work and identify ways to become more productive.

3. Develop a well-planned reduction in force policy whereby staff members can be transferred to improve pupil-teacher ratios in specialized areas.

4. Stagger building schedules so that specialized staff can work in two or more buildings and students can be transported more efficiently.

5. Combine two or more part-time positions into one full-time position.

6. When an additional class section is needed in a secondary school, pay a regular teacher to work an extra period rather than hiring a teacher for that period.

7. Hire two or three "permanent substitutes" to replace absent staff members. This may provide for better substitute service.

8. Place all administrators on eight-hour day, twelve-month contracts.

9. Extend the working day for consultants.

10. Redescribe staff responsibilities.

    - Analyze job descriptions for cooks, custodians, bus drivers, and others.
    - Utilize a high school librarian for district-wide purchasing of library-media services.
    - Employ out-of-district consultants to complete specific, one-time tasks at a cost less than maintaining a full-time staff person with those skills.
    - Select teachers to coordinate curriculum development projects on a part-time basis.

- Utilize substitute teacher funds for such enrichment programs as films, guest speakers, etc. An absent teacher could elect either a substitute teacher for the class or enrichment program attendance.
- Expand the duties of teacher aides and paraprofessionals to the full extent allowed by law and regulations.
- Use paraprofessionals for study hall or corridor duty, allowing teachers more time for instruction.
- Change staffing patterns--replace an all-teacher physical education staff with a team made up of fewer teachers and more trained paraprofessionals for less pay.

11. Utilize volunteers for tutoring, grading papers, and other services.

12. Hire employees in cooperation with other agencies such as: other school districts, education service districts, community colleges, city and county government. (See Cost-Saving Idea #3, page 2-12.)

13. Reduce staff absenteeism (cutting health costs) by initiating or improving an employee wellness program. (See Cost-Saving Idea #2, page 2-12.)

Ideas which reduce expenditures without necessarily reducing services--

1. Develop collective bargaining contracts carefully. (See Cost-Saving Idea #1, page 2-11.)

   - Do not tie salary increases directly to the CPI; this may result in an escalation of salaries beyond the funds available.
   - Sign a two- or three-year agreement with employees, but provide for a review of the economic package for the second and third years.
   - Renegotiate salary schedules.
     - Freeze or reduce all salaries for a specified period of time.
     - Hold to the same salary schedule for another year, but allow the step increases on the salary schedule to remain.
   - Review and standardize salary and fringe benefit programs for all employees, eliminating costly exceptions.
     - Coordinate fringe benefits (medical and major medical, dental and life insurance) in cases where both spouses work for the school district.
     - Provide insurance coverage only for the employee.
     - Negotiate for increases in fringe benefits in lieu of salary increases.
     - Negotiate fringe benefit dollars, not benefits.
   - Districts paying insurance premiums for teachers could initiate a wellness insurance plan, with a portion of premiums returned to each member who stays well. (See Cost-Saving Idea #2, page 2-12.)
   - Freeze or reduce tuition reimbursement allowances.
   - Freeze or reduce paid leaves.

2. Review personnel policies for possible savings. Consider such factors as: staff development activities, professional growth requirements, pay policies.

3. Implement a plan requiring that school district administrators develop specific written suggestions to reduce costs, and to improve efficiency and productivity. This should be done on a quarterly basis.

4. Reduce the need for substitute teachers by minimizing teacher absenteeism. For example, one district removed its ceiling on accumulated sick leave, which significantly reduced absenteeism because employees knew that they would not "lose" sick leave hours.

5. Use temporary contracts for all new employees.

6. Hold off some teacher hiring until the start of the school year if elementary class sizes are not definite.

7. Hire personnel according to mid-year enrollment projections (which tend to be lower) rather than projections for the beginning of the school year.

8. Conduct all inservice during nonschool hours or on Saturdays.

9. Encourage all classes of employees to take early retirement by providing cash bonus or retroactive pay raise incentives. Provide early retirees with part-time employment opportunities. Increased staff turnover saves the dollar difference between top and entry-level salary schedules.

10. Adopt assertive termination procedures for those who cannot provide satisfactory services. In times of staff reduction, this could help retain excellent teachers who may be less experienced.

Ideas which reduce expenditures by reducing services--

1. Determine whether the district is overstaffed and reduce staff where possible.

   - Employ fewer specialists (music, physical education, special education, etc.)
   - Reduce the number of sections offered at the secondary school level.
   - Contract with a community college for advanced courses.
   - Shift or combine assignments.

2. Freeze hiring or establish a strict review process for hiring new employees to replace those leaving.

   - Do not replace personnel who have taken leaves of absence.

3. Reduce the number of administrators through multiassignments.

   - Share an area specialist with other districts.
   - Assign one principal to two schools, with a vice-principal or head teacher in each school.
   - Assign principals to teach part-time.
   - Establish combined superintendent/principal positions.
   - Combine curriculum supervision with evaluation supervision, etc.

4. Decentralize district administration; eliminate district curriculum departments and replace them with assignments to school administrators and staff.

5. Reduce the need for substitute teachers by utilizing administrators and counselors in the classrooms (i.e., each administrator and counselor in the district might be required to serve in the classroom for three days during the year).

6. Assign one less substitute per day to each high school; e.g., eight teacher absences, seven substitutes.

7. Utilize classroom teacher/student advisors to supplement the high school counseling program.

8. Where possible, reduce full-time teaching and nonteaching positions to half-time (e.g., librarian, home economics, foreign language, etc.)

9. Eliminate the number of specialist teachers with formal teaching loads and use them as resource teachers to assist regular classroom teachers.

School-Level Administration

School administrators and staff members provide direct services to students, and it is their responsibility to protect the health and safety of students while providing quality instruction. All of this should be done in a cost-effective manner, and now school principals are challenged to find ways to economize further. Staff and students can provide valuable suggestions. Everyone should understand that some areas facing cutbacks will be reinstated when funds allow, while other changes actually may prove to be better than current approaches.

Matters for consideration:

- Establish criteria for setting priorities.
- Consider ways to handle the disruptive student, the handicapped student. Perhaps compulsory attendance rules need modification.
- Be prepared to respond to the claim that the "senior year" is a waste.
- Research ways to modify building schedules, keeping parent and student complaints to a minimum.
- Consider alternative energy sources and ways to economize.
- Find ways to deal with collective bargaining requirements.
- Find out if TSPC will modify rules or grant waivers on assignments, etc.

The following money-saving suggestions focus on the use of staff and the school schedule; many can be found in other sections of this publication as well (e.g., Section 3, Instructional Services). The idea is to develop class and building schedules which provide for more cost-effective programs and services.

Staff

1. Consider contract alternatives used by some districts.

   - Reduce the number of days in contracts for administrators, teachers, and nonteaching staff (e.g., from 190 days to 187).
   - Add vacation days without pay.
   - Assign one certificated position to a program, assisted by volunteers and minimum pay personnel.
   - Cut back on the number of certificated supervisors.
   - Utilize more part-time personnel.
   - Utilize retired personnel more effectively.
   - Contract with community college staff or part-time teachers to teach specialized courses at the junior or senior high school level where there is limited enrollment or a lack of staff expertise.
   - Increase the use of student work programs.
   - Assign fewer coaches per sport.
   - Avoid duplication of classes offered at the junior and senior high schools.
   - Analyze the need for temporary employees. Consider consolidating part-time functions into full-time positions; temporary employees can help with short-term needs.

2. Consider cost-saving measures which may involve a request for a waiver of the State Standards for Public Schools.

   - Cut back on the number of days of instruction in the classroom by assigning students to outside research projects and individual study programs (field trips, etc.)
   - Utilize a four-day work week, with longer school days and additional work assignments.
   - Delay purchasing textbooks if current programs are successful now; the state may be willing to grant independent adoptions or waivers.

3. Reduce extracurricular activities.

   - Assign a minimum of one female, one male and one coed activity in both the athletic and nonathletic areas for each quarter (fall, winter, spring).
   - Reduce interschool activity schedules, including the number of activities, the number of nonleague activities, and distances traveled.

4. Reduce the number of electives. Consider scheduling a six-period day rather than seven periods.

5. Increase class size on a selective basis.

6. Offer driver training during the summer only on a self-supporting tuition basis.

Building Schedules

1. Examine subject matter content and methods, and consider combining all three major high school science courses (biology, chemistry, physics) into a single course that is scheduled over a three-year period, resulting in increased class size, fewer sections, and better use of science rooms.

2. Combine several levels of the same content area into a single class; for example, second, third and fourth year foreign language classes could be taught during the same period.

3. Consider the twelve-month school year.

   - Beneficial in a period of growth.
   - Added operating costs (custodial, administrative).
   - Seems most acceptable to parents and students in lower grades.

4. Consider a daily class schedule that places all planning time at the beginning of each day; teachers then are available for assignment during class time.

Transportation

Develop transportation patterns to reduce routes and frequency.

1. In districts with large numbers of students, and a comparatively small geographical size, stagger class starting and dismissal times to better utilize drivers and buses. The district will spend less on equipment, storage areas, insurance, driver wages and benefits, training and licensing. One large suburban district has found that its buses could be reduced perhaps 20 percent by rerouting, and by staggering the elementary school schedules by one-half hour.

2. Smaller districts with large distances to cover could eliminate early afternoon routes for the primary grades. While staff and parents may protest the longer school day, there will be cost savings.

3. Increase the walking distance expected of students to school and bus stops. While many believe this to be the best way to cut costs, it has proved highly controversial. Care must be taken to avoid possible traffic hazards to students.

4. Evaluate bus routes to be sure that buses are not duplicating one another, and that bus loads are distributed for greatest efficiency.

5. Reduce deadhead mileage by adding bus storage areas.

6. Stagger building schedules so that specialized staff can work in two or more buildings, and students can be transported more efficiently.

7. Reduce the frequency of early dismissals which require additional bus runs; dismiss all students at the same time to reduce runs.

Staffing Patterns

1. Study staff assignments to minimize "misassignments," but when necessary, plan appropriate inservice programs to assist in shifting employees to new assignments.

2. Develop and use a current catalog of graduates, retired employees and others in the community who may be willing to supplement instructional activities.

3. Develop, implement and encourage a program designed to make use of community volunteers.

Use of Buildings

1. Study buildings to make full use of all school facilities, including multipurpose and other instructional spaces.

2. Close wings or units of buildings by consolidating space.

3. Develop safety consciousness to reduce SAIF fees.

4. Consider setting up a fund for student activities that is used to pay for vandalism, with the balance available for student use.

5. Establish a realistic fee schedule for use of buildings by outside groups to at least recover the energy and custodial costs.

COST-SAVING IDEAS

Idea #1

Negotiate the "real cost to district" for wages and related costs, rather than just for "increases in salary schedule." In most districts, advertised salary increases are below the actual cost for those increases. For example, when the district provides a cost-of-living increase in salary schedules, and pays increased insurance premiums as well, the district is, in effect, paying insurance costs twice.

Advantage	Focuses on total employee compensation--all fixed charges and fringe benefit costs; i.e., PERS contribution (both employer and 67% pickup), social security, Workers' Compensation, sick leave, vacation leave, as well as insurance premiums.
Disadvantage	Probably will be resisted by employees.
Additional Information	It is helpful to list (perhaps using a microcomputer) proposed schedules and projected total costs to the district.

- - - - - -

Previous year's real cost to district = $_____
Percentage proposed salary increase x previous year's cost = _____

Plus:
- increases in Workers' Compensation _____
- increases in Social Security _____
- insurance increases (all types) _____
- increases in retirement (PERS) _____
- other fringe benefits _____

_____

Dollars needed to increase schedule amounts = $_____

Idea #2

Reward the entire staff for participating in a "wellness" program by offering an insurance rebate, such as Blue Cross' "wellchec," or by allowing staff to exercise during certain prescribed times.

Advantages	May increase productivity (better morale, less absenteeism, better instruction).
	Helps inform the community about wellness.
	May save money for the district.
	May increase student attendance.
Disadvantage	The community will need to be informed.
Additional Information	Inservice is needed about wellness, with an informed staff member to monitor the program.

Idea #3

Utilize current staff members as resource personnel for inservice training. A peer training model was introduced in one district when a full-time position for training special educators was lost. Using new state performance requirement standards for teaching, the district developed its own standards as well as a self-analysis system. Staff members assessed their own skills in light of the new standards and identified areas where they felt that they needed inservice. Then specific training modules were developed by staff trainers with expertise in those areas.

Advantages	Groups with like needs plan their own inservices and select district personnel who have the skills to deliver training.
	Staff participate in setting their own goals; peer trainers tend to become aware of district policies and practices.
	The trainers can be called on over an extended period of time.
	Training can be conducted as part of (in place of) staff meetings.
	Teachers from different disciplines are brought together, allowing for cross training among disciplines.
	A district staff development person is not needed to manage the program.
	The system allows staff members to make use of their special skills.

	Focuses on particular skills needed throughout the district.
	Expenses for outside-district trainers are saved.
Disadvantages	It may be difficult to agree on a time and place for personnel to meet. (One district has scheduled a monthly three-hour staff meeting and training session in its contract.)
	Some teachers may find it difficult to accept training from their peers.
	There may be areas of need which cannot be addressed by current staff.
Additional Information	While peer trainers can save money, trainers are only a part of a larger, well-organized system that must be in place. If experts are needed to provide specific training in addition to peer training, they may be contracted on an hourly basis.

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Section 3

Managing Costs Creatively

Oregon Department of Education
700 Pringle Parkway SE Salem, Oregon 97310

Verne A. Duncan
State Superintendent
of Public Instruction

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Federal law prohibits discrimination on the basis of race, color or national origin (Title VI of the Civil Rights Act of 1964); sex (Title IX of the Educational Amendments of 1972 and Title II of the Vocational Education Amendments of 1976); or handicap (Section 504 of the Rehabilitation Act of 1973) in educational programs and activities which receive federal assistance. Oregon laws prohibiting discrimination include ORS 659.150 and 659.030. The State Board of Education, furthermore, has adopted Oregon Administrative Rules regarding equal opportunity and nondiscrimination: OARs 581-21-045 through -049 and OAR 581-22-505.

It is the policy of the State Board of Education and a priority of the Oregon Department of Education to ensure equal opportunity in all educational programs and activities and in employment. The Department provides assistance as needed throughout the state's educational system concerning issues of equal opportunity, and has designated the following as responsible for coordinating the Department's efforts:

Title II--Vocational Education Equal Opportunity Specialist

Title VI and Title IX--Equal Education and Legal Specialist

Section 504--Assistant Superintendent, Special Education and Student Services Division

Inquiries may be addressed to the Oregon Department of Education, 700 Pringle Parkway SE, Salem 97310 or to the Regional Office for Civil Rights, Region X, 1321 Second Avenue, Seattle 98101.

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INTRODUCTION

This booklet is part of a series entitled, Managing Costs Creatively (MC^2). The series has been developed to provide school district administrators with the experience gained by others facing a decline in resources. Many of the suggestions offered in these pages may bring about greater cost-effectiveness, and even improved productivity. They should not be construed, however, as recommendations from the Department, the State Board nor the State Superintendent.

The material is printed individually by section for the sake of economy, so that each section can be directed to appropriate district personnel. Section 1 discusses the problem of declining funds for schools and solution strategies. Section 2 lists cost-saving tips for district and school-level administration. Section 3 presents cost-saving tips in curriculum, instruction, vocational education, special education, student services and media services. Section 4 lists cost-saving tips for support services: buildings and grounds, maintenance, pupil transportation and food services. Section 5 addresses cost savings for community colleges.

Some cost-saving ideas are described further at the end of the section and are listed in the Table of Contents on the following page. If a suggestion seems appropriate to more than one area, it is presented more than once.

Furthermore, there are approaches to cutting costs that seem to apply to almost any program area. For example:

> Have you considered the skills of your staff outside the areas of their professional training? You may have access to good part-time carpenters, mechanics, etc., or those who could help with drama, music, archery, etc., because of hobbies or other work experience.
>
> Have you considered exchange/trade-off arrangements with local business or industry (e.g., free lunches for volunteers to work with handicapped children, businesses to provide on-site learning settings or "consultants" in exchange for use of school facilities for their employees in the evenings, etc.)?
>
> Networking--Have you considered different avenues of cooperative action between schools, between districts, through ESDs or regional cooperatives for sharing resources (mechanics, repair and maintenance contracts) and for group purchase of materials, supplies or commodities?
>
> Are you utilizing industrial arts classes for construction projects (bookcases, partitions, rebuilding or refinishing furniture)?
>
> Have you fully explored all angles of parent/volunteer involvement--garage sales, flea markets, donations, help as playground supervisors, helping locate used furniture or equipment from business or government offices where they are cutting back?

If you have additional ideas or resources to share with others, please send them to the MC^2 Clearinghouse at the Department. If you have comments or questions, call Don Egge, Associate Superintendent for Policy and Program Development, who is directing the MC^2 project. Telephone 378-8525, or toll free in Oregon 1-800-452-7813, ext. 8-8525.

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SECTION 3

INSTRUCTIONAL SERVICES

The quality of each student's education depends on the effectiveness of teaching and learning. Reductions in funds could undermine the quality of instruction unless districts take the time to critically examine the issues at stake and establish priorities for decision-making.

While to some people, budget reduction involves cutting staff, stabilizing salaries and increasing class size, the key actually is finding the best ways available to improve the effectiveness of curriculum and instruction for the least amount of dollars. Ideas to consider are described in these pages.

Curriculum

Offerings

Conduct curriculum and course reviews to determine what can be eliminated, ranking programs by priority.

Examine subject matter and methods to determine the feasibility of combining multiple courses into a single class period; e.g., second, third and fourth year foreign language together; pooled business education courses. (See Cost-Saving Idea #1, page 3-13.)

Offer classes on alternating years.

Charge fees for student participation in nonrequired classes.

Organization

Eliminate kindergartens and provide structured activities for use in the home.

Several districts, jointly or with a community college, could operate the more expensive educational programs or an alternative school.

Approve early graduation for employed students and those ready for college-level work.

Provide other options for reluctant attenders; re-entry with dignity into the school program should remain as a feasible option.

Allow more alternatives for credit: outside learning activities (private lessons or activities in music, athletics, art or drama; work experience), credit by examination, open entry/open exit courses, home study programs (correspondence, computer and television), and performance-based programs.

Instruction

Use of Time

Consider the optimum number of days needed to accomplish curriculum goals; consider year-round school.

Combine instruction in related subjects.

Establish a common staff preparation time prior to the arrival of students or after they leave.

Increase academic learning time to help raise student achievement levels. (See Cost-Saving Idea #3, page 3-14.)

Make the primary-age student's day longer in order to coordinate with the bus schedule, or consider a full day of instruction every other day. (See also Section 4, page 4-6.)

Staffing

Analyze staff tasks to determine the most efficient ways to utilize employees and others (teachers, aides, volunteers, students, custodial, administrators, retired personnel, parents). Involve staff in suggesting ideas on cutting costs through such means as variable staffing patterns, flexible working hours, use of funds for substitutes, etc. (See Cost-Saving Idea #2, page 3-13.)

Volunteers might serve as monitors of halls, buses, and playgrounds in place of paid personnel, club and organization advisors, and aides. Reward service with golden age cards, free lunches, or some other type of special recognition.

Utilize parents and other volunteers to assist with in-school kindergarten or preschool activities.

Identify instructional programs in which students can receive instruction while performing a service for the school/district. For example, students in typing classes could produce school correspondence and bulletins.

Combine all levels of a particular sport for coaching and instruction.

Increase the teacher-pupil ratio for lecture classes.

Utilize cross-grade groupings.

Eighth grade students could be moved into the high school to better utilize staff and space. (Perhaps the eighth-graders' schedule could be different from the high school schedule.)

Space and Equipment

Provide teachers with work space, thus freeing classrooms for instructional purposes.

Lease out any unused facilities or equipment.

Where a facility or expertise is not available or would be unnecessarily duplicated, contract with the community (local offices, shops, hospitals, community college) to provide specialized instruction.

Consider leasing or the lease/ purchase of equipment, rather than outright purchase. Explore the possibility of equipment grants from businesses within the area.

Cooperatively purchase equipment used for short periods of time, rotating its use.

Review the use of telephones to determine their need. A central telephone may be adequate for most purposes.

Scheduling

Consider year-round school operation.

To conserve energy and expense, schedule school activities (e.g., atheletics, music, and drama) during school hours, in the afternoon or on Saturdays, instead of evenings.

Materials

Purchase only instructional materials which relate to specific instructional goals.

Provide incentives for teachers to become more cost-conscious in the use of instructional materials.

Establish a regional clearinghouse to coordinate distribution of used and surplus textbooks, and to fill shortages. (See Cost-Saving Idea #4, page 3-15.)

Consider using other relevant materials to limit the number of textbooks needed.

Consider using self-instructional materials for individualized programs (computer-assisted instruction, videotape, learning packages).

Use outside resources to supplement school materials (local and state libraries, museums, businesses, ESD materials centers).

Vocational Education

School Management

Utilize the publication Planning for Progress, Evaluating, and Planning for Vocational Education in Oregon to review an existing, alternative or new vocational program in terms of cost-effectiveness.

Use microcomputers already in the school to help counselors with individual scheduling and program planning.

Staffing

Industrial arts and vocational agriculture classes could be combined, eliminating the need for one teacher.

Reduce the duration of the vocational agriculture teacher's contract, from 240 days to 215, which still would allow for summer and teacher inservice programs.

Alternative Program Design

Offer an open lab, with a teacher and an aide available to assist students; e.g., individualized accounting and secretarial classes, welding.

Where the vocational needs of students cannot be met at school, contract with business interests to teach classes in offices, shops and hospitals in the community. Develop cooperative programs with the local community college.

Avoid duplication of programs in adjacent school districts and in multiple high school districts; share programs, equipment and facilities. (See Cost-Saving Idea #6, page 3-16.)

Emphasize such programs as diversified occupations and cooperative work experience to minimize the need for facilities and expensive equipment.

Self-Supporting Programs

Include a unit on catering in the Food Service Cluster; catering for actual events in school and outside could pay for the food used in training.

Offer a manufacturing class, including the sale of student-manufactured goods. In this regard, all vocational programs should investigate profit possibilities in program activities.

Utilize student initiative and leadership through student leadership organizations to earn money for needed equipment and supplies.

Equipment and Supplies

Utilize the TRS-80 or other microcomputer to simulate word processing equipment.

Solicit equipment contributions to school programs from local industry.

Acquire scrap materials from business and industry for classroom use, after which it can be returned to industry again to be sold as scrap.

Make children's and infant's clothing in home economics or clothing construction classes; fewer supplies are required.

Require that students pay a nonrefundable lost/broken tool fee.

Advisory Committees

Coordinate programs in such a way that an "umbrella-type" advisory committee could meet advisory committee requirements for high school, community college and apprenticeship programs; insure that membership is broad enough to accomplish the results desired.

Special Education

Individualized instruction is essential to the student who is handicapped; such instruction emphasizes each student's interests, abilities, motivation, goals, learning rate, and prognosis for moving ahead in the curriculum. Further, according to federal and state law public schools are required to provide an appropriate education to these students.

In order to meet the needs of this special population, districts need to develop approaches for handling reductions in funds and staff and still deliver services. Following are ideas which districts might try:

Limitations on Services

Use of stricter eligibility criteria would limit the number of handicapped students served; those who are classified as "marginally" handicapped could be served through the regular school program.

Diagnostic evaluations could be limited to the minimum required by law. Not all evaluation techniques and materials currently in use are essential, such as the practice of administering an IQ test to every student who might have a learning disability. Some practices could be eliminated without adversely affecting students.

Staffing

Special education teachers, serving as consultants to regular classroom teachers, could help develop and manage handicapped students' IEPs, and oversee the delivery of services.

Hire teachers with special education certification as well as regular certification to teach in the regular class setting and provide special education services at the same time.

Expand the use of paraprofessionals; e.g., instead of employing two teachers, employ one teacher and two aides. (See Cost-Saving Idea #7, page 3-16.)

Encourage high school and college students, parents, and other volunteers in the district to serve as aides or teaching assistants.

A special education teacher could handle more than one assignment; for example, a speech teacher also could serve as a speech/behavioral specialist.

When there are only a few students with a particular handicapping condition, these students could be served in other classes for handicapped students, using aides as necessary. (See Cost-Saving Idea #8, page 3-17.)

Join with other districts to deliver such services as physical therapy and occupational therapy. (See Cost-Saving Idea #9, page 3-18.)

Seek help from community groups; for example, service clubs can plan special projects to generate funds and provide other assistance.

When facing cutbacks in special education, it may be helpful to consider the following questions:

Current practice

- Does an existing situation require a change?
- Are there only 1-4 students in one age group (elementary, junior high, high school) who need a program?
- Have the funding sources decreased so that it is no longer feasible to have a few students in a categorical, self-contained class?

Cost

- What is the current cost of operation?
- What would the cost be with a new model?
- What is the most economical way to group students?

Personnel

- Can programs be eliminated rather than personnel?
- Can personnel be used in other ways; i.e., as consultants rather than teachers?
- Can current staff be used in a transdisciplinary approach?
- Is inservice training available for new staff roles in new models?

Building utilization

- Will as many school facilities be needed?

Transportation

- Are students being transported in the most economical way possible?
- Are students receiving services as close to home as possible?

Placement

- How do students move from one program to another in the district?
- Will new eligibility data need to be gathered for new models?
- Are models being developed which address the needs of the low incidence students?
- Can new models be developed without disturbing federal and state categorical funding channels?

Parents

- Will parents be involved in creating new models?
- What will the extent of parent involvement be?

Options

- Is a new model being developed that is functional?
- Have the needs of the students and resources available been assessed, and how do these two factors compare or differ?
- Have all options for models been explored?
- Have any ideas been excluded?
- Have the ideas allowed for openness and creativity?

Guidance Programs

When school districts take steps to cut costs, there is often greater need for guidance services. The incidence of crime, suicide, and child abuse rises with the increase in the unemployment rate, thus creating many educational problems for the school. Increased stress on the family, coupled with limitations in class selections, curtailment of student activities and alternatives, and increased class size may be accompanied by more discipline and attendance problems, and increases in drop-out rates.

Providing quality programs in a time of limited resources forces hard decisions: should whole programs be cut? the school year be shortened? supplies cut in half? professional development curtailed? These are just a few of the questions which educators are facing.

Two Guiding Principles

Those who already have had to grapple with the dilemma of shrinking resources have found that:

- Program quality is preserved best by utilizing the most effective techniques available for delivery of instruction and services. With guidance, this means using classroom and group guidance techniques, teacher advisor programs, and trained volunteers, as well as the judicious use of paraprofessionals and the development of programs based on identified needs.

- Curtailing each program somewhat may be better than eliminating one or more programs altogether. However, when a program is significantly reduced in staff, the focus of the program also must be narrowed to maintain quality.

The cost-saving ideas below suggest ways to limit programs without permanently crippling services to students.

1. Assign counselors, administrators and other support personnel as "duty substitutes" for one day per week. (See Cost-Saving Idea #10, page 3-19.)

2. Assign one period of teaching per day to six nonteaching staff members, saving the cost of one FTE teaching position. (See Cost-Saving Idea #11, page 3-19.)

3. Using the "critical time" principle, save the funds spent on extended contracts for counselors, administrators, librarians, and other nonteaching staff members. Place counselors on contract for the same length of time as teachers, but readjust the scheduled work days for each counselor. For instance, since counselors need to be on duty the week before and the week after school opens, they could take two weeks off while school is in session. For most jobs, there are times when it is essential to accomplish certain tasks, and there are "slack" times. A counselor's slack time tends to occur the week prior to Christmas vacation, and in the middle of the third grading period. The same applies for elementary principals: the two weeks prior to opening of school are far more critical than the weeks of Christmas and spring vacation.

4. Careful analysis of the work performed by an individual may show that someone else could assume some of the duties. Assign counselors to tasks in other areas where there have been staff reductions; at the same time, assign certain counselor tasks to others whose services cost less, including: scheduling (to the teacher), educational advising (teacher), record-keeping (clerical staff), routine schedule changes (secretarial staff). (See Cost-Saving Idea #12, page 3-20.)

5. Save one-third FTE by utilizing an intern counselor, teacher, administrator, etc., when a vacancy occurs.

6. While it is not cost-effective over the long run, the district could temporarily discontinue paying for staff travel, inservice training, attendance at conferences, supplementary materials and college tuition. Counselors and others could be encouraged to assume these costs, claiming them as tax deductions.

7. Save FTE by having counselors teach guidance related classes, such as career education and self-awareness.

Media Services

A school's media services support all instructional programs, and any reductions in school staff could result in larger class loads, which may lead to the need for more media support services. If the media program expenditures must be reduced, a task force representing the entire staff (e.g., administrators, media specialists, teachers, lay personnel) should be involved in making decisions about reductions.

In addition, school districts should be made more aware of the services available from the Department of Education in the area of media, which include instructional television, library services, audiovisual services, and computers. Some cost-saving ideas are mentioned below:

Administration

1. Give the district media coordinator (a position required by the State Standards for Public Schools) more responsibility to coordinate and implement cost-saving ideas within the district media program in order to eliminate unnecessary duplication and procedures. (See Cost-Saving Idea #17, page 3-23.)

2. Consider the advantages and disadvantages of centralizing selected activities at the district level: purchase of materials, textbooks and workbooks, printing services, the production of materials, cataloging. (See Cost-Saving Idea #23, page 3-27.)

3. Consider the pros and cons of unifying the school and public library. Such an arrangement has been successful in certain communities. (See Cost-Saving Idea #21, page 3-26.)

4. When implementing federal and state program requirements to establish resource centers for Title I, etc., consider integration with existing media center facilities and management systems.

5. Schools should contact ESDs and other agencies for coordinating cost-saving services and information.

6. Consider a central depository for rarely used materials. Such cooperation may be feasible within a district, between several districts, or through an ESD.

7. Be sure a materials selection policy is developed and implemented for the district.

8. Eliminate cataloging at the building level; currently, much time is wasted on recataloging preprocessed materials.

9. Consider installing an electronic security system in the media center. Studies have shown that such systems have paid for themselves within two and one-half years. (See Cost-Saving Idea #20, page 3-25.)

10. Consider the pros and cons of computerizing the card catalog.

11. Keep current on developments in instructional technology for media programs and instruction (e.g., microcomputers in schools, etc.)

12. Conduct a flea market and sell items (books, authorized equipment, small-furniture, etc.) which are no longer needed or used by the school. Proceeds may be used to meet a specific media program need; increased space may be another benefit. (See Cost-Saving Idea #22, page 3-26.)

13. Consider the pros and cons of collecting fees on lost, damaged or stolen books, or require students to perform work to repay costs incurred.

14. Seek out donations for materials and funds from public and private sources. Any materials donated should meet district specifications.

Services

15. When applicable, obtain copyright release to reprint only those portions of textbooks and supplementary materials which are used in the district's instructional program.

16. Consider the cost-effectiveness of photocopying as opposed to offset printing.

17. Consider the use of video cassettes in place of 16mm format.

18. Encourage teachers to utilize in-school television programming, provided at no charge by the Department of Education and broadcast by the Oregon Public Broadcasting Service.

19. Consider the applications of microcomputers in the media centers for library management applications, as well as for instructional purposes.

Materials

20. Arrange for increased resource sharing among schools, districts, ESDs, and such other agencies as public libraries, community colleges, special libraries, etc.

21. Consider cooperative purchasing of materials, periodicals: within districts, between districts, through ESDs, or through regional organizations. A single bidding process still allows for independent purchases by cooperating schools and districts. Product quality and cost-saving can be assured in the written contract, and bigger bid packages will yield greater discounts. (See Cost-Saving Idea #18, page 3-24.)

22. Evaluate frequency of use of periodicals; prioritize them according to use and need; discontinue low priority subscriptions.

23. When older books (library materials and textbooks) will continue to be used, consider rebinding rather than purchasing new copies. (See Cost-Saving Idea #19, page 3-25.)

24. Consider a temporary moratorium on the purchase of books for a given curriculum area. Subscriptions for periodicals and newspapers should be maintained.

25. Weed materials collections of old, outdated materials.

Equipment

26. Purchase expensive equipment cooperatively.

27. Investigate the pros and cons of equipment maintenance contracts.

28. Consider the advantages and disadvantages of a lease option when purchasing equipment.

29. When cost-effective, use shop classes or projects to build items for the media center/school.

30. Consolidate media equipment repair for several districts.

31. Refinish furniture or equipment rather than making new purchases.

32. When cost-effective, store equipment and materials from schools which are temporarily closed. A careful inventory should be maintained.

COST-SAVING IDEAS

Curriculum

Idea #1

High schools offer specialized science courses to relatively small numbers of students, making science instruction an area of high cost. A well-coordinated science program can be developed that will reduce costs while providing a complete high school science curriculum.

Advantages	Class size may be increased, particularly in smaller districts.
	Science instruction may be more effective.
	Allows for greater staff flexibility.
Disadvantages	Science staff members lose their unique identities.
	The public does not see clearly "labeled" science courses.
	Students do not necessarily understand that they have taken an equivalent to a given specialty.
Additional Information	At least one FTE science staff might be saved in a high school of 600 students. Initially, a sum of money may need to be set aside for such factors as: larger class enrollment, introducing new content, special exercises, integrating the subject areas.
	Students could learn how to apply scientific knowledge and skills in an integrated way to solve everyday problems.

Instruction

Idea #2

Many of the tasks currently assigned to administrators, when broken down into small jobs, can be carried out by paraprofessionals following short-term training. This requires precise analysis of job descriptions, so that responsibilities can be itemized.

Advantages	Administrative costs can be reduced.
	The time spent on the task can be increased.
	Such task analysis might be applied to other programs.

Disadvantages	Less status may be assigned to a task.
	Less attention may be paid to the exact interpretation of laws and regulations.
	More than one person becomes responsible for a program or program component.
Additional Information	There will be concern over job losses due to replacement by paraprofessionals.
	The adoption of this concept could save significantly on administrator time, which could be diverted to direct instruction or supervision of instructional programs. The principal might be responsible for greater instructional leadership in specialized areas.

Idea #3

It has been found that if the amount of time spent directly on learning a task can be increased, there is a significant chance that student achievement levels can be increased. The best method of increasing learning time is to improve classroom management. This currently is being done by a program called "Model Classrooms."

Advantages	Greater achievement for the dollar invested in teacher time.
	Student attitudes improve toward school.
	Improved student assessment program.
Disadvantages	There is an initial cost of $200 for start-up materials per classroom.
	Increased regimentation of learning.
Additional Information	The initial cost of entering the program and maintenance of student progress records probably will increase material costs, but there may be less expenses for behavioral concerns.
	Students can assume more responsibility for their own behavior, and teachers analyze their actions more carefully.

Idea #4

A clearinghouse system can be established for textbooks which are available, in surplus, or for which there is a shortage.

Advantages	Allows districts to reduce the inventory of current texts which they must carry; spares and replacements will be easier to locate.
	Useful life of text series will be extended by making replacements easier.
	Better utilization will be made of inventories around the state.
	Existing texts can be re-adopted more easily, rather than having to adopt new series due to unavailability of texts.
Disadvantages	Requires labor and materials to establish and maintain a central file of needs and preferences.
	Materials could be entered into computer file by ISBN for faster, easier match-ups.
Additional Information	It is not known what the supply of surplus books is at this time, or how that compares with district needs around the state.

Vocational Education

Idea #5

Limit the specialized vocational education program to the junior/senior level, and teach only those occupational skills which are considered vital for entering the labor market.

Most high schools are now geared toward introductory programs; ninth- and tenth-graders would take introductory courses designed to give them a sense of things to come.

Advantages	Requires school districts to hire teachers who are specialists in their fields.
	Makes possible the use of specialists who teach the same occupational skill in more than one vocational area.
Disadvantage	Small school districts per se would not be able to do this because they do not have enough students.

Idea #6

Two or more school districts could offer a joint program, available to all students.

Advantages

Districts jointly finance the costs, assisted by state vocational funds to pay for the cost overage.

Could lead to full enrollments and the provision of more adequate equipment.

Surplus U.S. Government equipment frequently is available which can be obtained if adequate use can be shown.

Joint use of facilities would also require use of instructors in common, but this will not necessarily create difficulties.

Special Education

Idea #7

Combine two classes, each with a teacher and an aide, into one class with one teacher and two aides. For example, in order to cut costs, a class of ten students with severe language learning difficulties was combined with a class of fifteen with severe learning disabilities. Both classes had been self-contained. The combined class was assigned to a teacher and two aides. Additional support was added to the program by increasing the amount of time the speech and language pathologist worked with students. In addition, another special education teacher provided some training in language development.

Advantages

The district was able to eliminate the need for one teacher, who accepted a regular classroom teaching position.

Disadvantages

It was more difficult to meet the educational needs of the students, even though the teacher in this case was considered particularly able. The teacher must be able to function as a planner/supervisor, with aides handling a considerable amount of the actual instruction.

One parent felt that the larger class size resulted in less than adequate instruction, and the district was involved in a due process hearing. (The district won the hearing.)

Additional Information

The district contracted with one less teacher--a savings of approximately $20,000. The due process hearing cost the district approximately $6,000, plus the staff time involved.

To a much greater degree, the teacher must be able to assume the role of a classroom manager and be able to deliver services through aides. Additional support services may be needed.

Since implementing the change, special education enrollment has increased in one class to the point where the teacher assigned language development responsibilities could no longer assist the class. At the same time, another district special education class dropped in enrollment; students in this class were transferred to two other similar classes. Their teacher then took half of the children from the combined class. The final result was the two original classes with one teacher and one aide each, and one less class.

Idea #8

Combine severely and moderately handicapped students in a classroom with one teacher and one aide.

Normally there would be a teacher for the moderately handicapped and one teacher for the severely handicapped. The latter group would be served with aides through what is known as the "rural model."

Advantages

The moderately handicapped students serve as models for the more severely handicapped.

The model saves costs of providing "rural model" services which would require the services of one full-time aide for each severely handicapped student.

Transportation can be combined for severe and moderate students, and some can ride regular buses.

Disadvantages

The model requires a teacher that can and will serve both severely and moderately handicapped in a single setting.

Students are viewed as belonging to a special class and regular teachers are reluctant to have these students in their classes, as opposed to a situation where students who are based in a homeroom go to a resource room.

Additional Information

The first year the teacher had to conduct public relations work with the school.

The model is based on a small population of handicapped students.

The special education students performed well; the program is effective and is well accepted in the school (K-3).

Idea #9

Districts may be able to cut costs by contracting for specific instructional services which, in the past, have been provided by on-staff personnel. One district has contracted for physical therapy and occupational therapy, and plans to contract for home instruction. In addition, the distict is considering contracting for services to be provided to low-incident students, such as the severely emotionally disturbed.

Advantages

Services can be contracted at a fixed rate for a fixed duration of time. The one district's rate is equal to the district's contracted summer rate--the amount that teachers are paid for summer work beyond their regular contract ($10.99 per hour). Regular district pay averages over $110 per day, about twice the contractual rate.

The district does not have to pay fixed costs on contracts, which normally fall between 33 to 38 percent of salary costs.

If the contractor is not meeting the performance standards of the contract, the contract can be terminated.

At present, there are no job losses as contracting is utilized only when natural attrition occurs.

Disadvantages

Staff personnel who performed the services in the past must be reassigned; attrition has solved this problem until now for the one district.

Programs must be supervised and evaluated by district staff to maintain quality services.

It takes time to locate qualified staff and turnover may be greater.

Using this method implies school staffing for IEP development, supervision of the services, and the availability of qualified contractors, as well as the utilization of the resources of larger metropolitan areas, ESDs or district cooperatives.

Additional Information

There should be little impact on students.

Student Services

Idea #10

Utilize support personnel as substitute teachers. Assign counselors, administrators and other support personnel for "duty substitute" one day per week; i.e., if a substitute is needed Monday, one counselor serves while other counselors remain on assignment; if a substitute is needed Tuesday, another counselor serves, etc. Other nonteaching staff would serve in the same way.

Advantages

The district would be able to save the cost of one FTE substitute salary for every five persons involved in this process.

Utilizing support personnel in this manner will preserve 80 percent of the services of those involved in the "duty substitute program."

Disadvantages

The "duty substitute program" will reduce the services available to students, teachers, and parents by 20 percent; i.e., each counselor will function as a counselor only four days per week.

Additional Information

The district coordinator can develop the specific scheduling procedures in cooperation with building principals and support personnel prior to implementation. The concept should be explained to all staff members as procedures are developed.

Idea #11

Have guidance staff teach related courses. In the last 15 years, a number of districts in Oregon have maintained a moderately staffed guidance program by utilizing counselors to teach courses. Because counselors are required to hold teacher certification and have teaching experience prior to receiving counselor certification, each counselor in the state is proficient in one or more subject areas. (Counselors coming into Oregon from other states may lack teaching experience.) While some districts have utilized counselors to teach one or two periods per day in their primary teaching field, most now use them to teach related courses such as career education, psychology, leadership skills, or communication skills.

Advantages

One FTE staff can be saved if there are enough counselors or personnel available to combine counselor duties with other staff functions to fill one teaching slot.

In large schools, each of the two counselors may teach one period and the activities director, librarian, vice principal, or a central office staff person may do the same. This maintains a basic program but at a reduced level.

Disadvantages	Based on a six-period day, 17 percent is lost of each counseling position's time if the counselor teaches one class. This means a reduction in the results that can be expected in the counseling program. It also means less flexibility for the individuals involved. Parents, away-from-school activities and emergencies take second place when class is in session.
Additional Information	Since counselors, librarians and administrators all have advanced training, this approach may mean that the district is paying slightly more for each class taught than for the same class taught by regular teachers. Eighty-three percent of each program may be preserved. This approach requires that the staff involved maintain expertise in two fields, which adds to the demands placed on them.

Idea #12

Utilize a paraprofessional to perform many duties which do not require professional expertise. For example, in a school of 2 FTE counselors, assign 1.5 FTE counselors and .5 FTE paraprofessional. The paraprofessional assumes scheduling, recordkeeping, attendance checking or other duties assigned to the counselor.

Advantages	Yields a cost-savings of approximately 50 percent of a professional's salary by utilizing a paraprofessional. Paraprofessionals are often more efficient at some of these duties. Supplies students with an additional contact; not all counselors relate to all students.
Disadvantages	Reduces assigned counseling time available to students.
Additional Information	The paraprofessional needs training in handling of confidential information, recordkeeping, telephone, etc.

Idea #13

Utilize teachers to provide guidance services (i.e., "Guide Program"). Assign guidance responsibilities to be shared among teaching staff.

Advantages	Reduces the number of assigned counselors.
	Teachers become closer and more familiar with students.
	Teachers become more aware of the total school program.
Disadvantages	Could result in taking teaching time away from the classroom.
	Some teachers are not well prepared to accept guidance and counseling responsibilities.
	Teachers may resist the assignment.
Additional Information	Clear and specific task assignments need to be made.
	An inservice program may be needed to prepare administrators, counselors and teachers to implement the program.
	Care should be taken in matching teachers and students.
	The program must be monitored and evaluated, with feedback to teachers on the effectiveness of the program.

Idea #14

Use a "Mobile Guidance Unit" to provide guidance and counseling services to small rural school districts or schools within a district.

Advantages	Professional guidance and counseling services would be available and costs shared by several districts or schools.
	Shared facilities and equipment would reduce costs to any single district.
	The counselor is utilized as a resource person to teaching staff.
Disadvantages	The counselor is not a member of the school staff.
	The counselor is not available for crisis counseling.
	Time is needed to coordinate activities and for travel.
	Longer working days for the counselor sometimes result.
	There is an initial cost for materials and the mobile unit.

Additional Information	Requires coordination and cooperative agreements among several districts.
	Requires a counselor who can establish good working relationships with many schools and districts.
	Requires a steering committee to evaluate the program and make recommendations on improvement.

Idea #15

Analyze procedures for assisting some students to make a successful transition to alternative education programs. Assist these students to seek education or work through private programs supported by flow-through from basic school support funds or jobs in business and industry.

Advantages	Reduces youth unemployment through successful transition from school to work.
	Attendance rates improve.
	Achievement test scores rise amoung youth who find meaning in their education programs.
	Intervention at an early age has greater promise of productive lifetime employment.
Disadvantages	Communities may feel the effects of youths' presence in the community, with a possible increase in juvenile court referrals and crime.
	Some communities may view the alternative program as a failure for the student or the school.
	Basic school support funds would not be received if students are not enrolled in school or alternative programs.
Additional Information	Greater sensitivity to the needs of students and knowledge of the law specific to alternative programs will be necessary to make this process effective.
	Adequate criteria for identification and placement of students need to be developed.
	Care should be exercised to involve parents whenever possible in any decision related to the education of students.

Idea #16

Have counselors work with the emotionally handicapped. Utilize one or more counselors to work part-time with emotionally handicapped students in a classroom. These students could carry as much of the regular program as possible, while attending this class one or two periods daily.

Advantages — Assists in mainstreaming students who have emotional handicaps, while producing a cost savings due to the fact that the district does not need to employ a special education teacher for this group of students.

Disadvantages — Reduces counseling time available to all students. Places additional responsibilities on some counselors; not all counselors can work effectively with the emotionally handicapped.

Additional Inforamtion — The cost of hiring a half-time teacher for emotionally handicapped is about $10,000. This cost could be saved by involving two or more counselors. The cost-saving would be proportionate to the number of students served.

Students would be assisted in adapting to the school environment. Some counselors might require additional training.

Media Services

Idea #17

The district media coordinator could be given the authority to handle the ordering and use of expensive items on a district-wide basis; in some cases, this may involve close coordination with building administrators. Coordinating the purchase and use at the district level can reduce costs and avoid duplication.

Advantages — Could eliminate some duplication of items.

Coordinates sharing of items between schools (e.g., VCRs and microcomputers) not in constant use.

Allows for the coordinated purchase of expensive hardware.

Establishes a clearinghouse for locating items.

Disadvantages	In addition to the building principal, another individual will be involved in media purchases. Some inconveniences in time for purchasing may occur. Some inconvenience may result because of shared use of items. Sharing of items may mean reduced services until the fiscal situation improves.
Fiscal Information	Savings amounts will vary depending on current efficiency of school district coordination.

Idea #18

Periodicals are purchased by all schools, and community colleges; they are the best source of current information available. It may be possible to obtain additional discounts from subscription service agencies through cooperative purchasing arrangements. Such arrangements may be within districts, between districts, through ESDs, or through regional organizations.

Advantages	Additional discounts may be possible. Periodical ordering by participating libraries can be better controlled. Better cooperation in ordering and sharing of low-use, high-cost periodicals. May encourage more cooperation among libraries.
Disadvantages	Copying and copyright problems may occur. Close cooperation and coordination in initial stages will be required. Problems in obtaining periodicals may occur at individual libraries. Time frame for settling problems may be extended.
Additional Information	More cooperation on the part of libraries would probably occur. Union lists of serials (periodicals) for the participating libraries would allow for better knowledge of an access to periodicals in a given area. Students and teachers would have access to a wider array of material to support instructional programs.

Idea #19

Consider rebinding old and damaged textbooks, as well as other instructional materials, rather than replacing them with new copies.

Advantages	Cost of replacement through binding is roughly 35 to 40 percent of new copy price (binding costs $4-$5 per volume; new, $10-$12).
	Extends the usable life of text and library materials.
Disadvantages	Coordination is needed.
	Materials are not available while in binding.
	Criteria for binding need to be developed.
Additional Information	Good staff coordination is required; good communication with the bindery is needed. Criteria for rebinding need to be developed. Some criteria are available from the Department of Education.

Idea #20

Install electronic security systems in media centers.

Advantages	Reduces the loss of books and other materials from media centers.
	Results in sizable financial savings to the district.
	Increases the availability and quantity of learning materials.
	Reduces the "police role" of the library staff, allowing more time for direct service.
Disadvantages	The initial cost of installation would increase the budget.
	School districts which have installed such systems have recouped initial costs within one or two years, with substantial savings over longer periods of time.

Idea #21

Consider unifying the school and public libraries; it has worked well for certain communities.

Advantages	Allows for common utilization of one library facility.
	Allows for common utilization of a larger collection of materials.
	Combines selection and purchase of materials for potential discounts.
	Allows for facility use during the day, as well as during evening hours and on weekends.
	Allows the public more exposure to the school setting.
Disadvantages	Adults may not feel comfortable sharing a facility and materials with students.
	Adult materials may need to be segregated.
	May require more staffing by professionals and nonprofessionals.
	Will require combining of the card catalogs of public and school libraries.
Additional Information	Representatives from both the school and community need to be involved. Local laws and statutes need to be consulted. Communication with the public is critical throughout the process.

Idea #22

Out-of-date or seldom-used materials should be removed selectively from the media center and classrooms. Such removal allows for additional shelf space and more efficient use of the media center.

Advantages	More shelf space.
	More up-to-date collection of materials.
	Better utilization of existing equipment.
	More efficient housekeeping.
	Elimination of materials which are irrelevant to the curriculum.
Disadvantages	Material removed may be needed at some later date.
	Takes time and staff to develop criteria for removal.

Additional Information	Good criteria needs to be developed for the removal of materials and equipment, and competent staff need to be assigned responsibility for removal.

Idea #23

The district should develop a district-wide materials selection policy in order to assure that only relevant materials are purchased to support the curriculum and leisure reading needs of students and teachers.

Advantages	Costly random purchasing of materials may be eliminated.
	Improves quality of materials.
	May encourage more cooperation in selection and purchase of materials.
	Criteria for selection may eliminate censorship problems.
Disadvantage	Takes time to develop a sound policy.
Additional Information	Good selection criteria need to be developed; leadership is needed to manage the selection process. The Department of Education has guidelines for developing a selection policy.

Idea #24

Teachers should be encouraged to utilize in-school television curriculum provided by the Department of Education and broadcast by Oregon Public Broadcasting Service.

Advantages	Each series is a designed curriculum sequence encompassing a full unit of study.
	The series are provided at no fee by the Department.
	Eases the burden of larger class sizes which teachers are facing.
	Forms a base of student knowledge from which teachers can build toward higher levels of learning.
	Low cost teacher's guides are available for most series which often include student exercises ($1-$3).
Disadvantages	At present, 27 percent of Oregon's schools cannot receive Oregon Public Broadcasting.
	A videorecorder may be necessary if series are not broadcast at convenient times.

Resources — An annual In-School Program Schedule is provided by the Department to each school at no charge. It describes each series and tells the dates, times of broadcast, and titles of each program within the series.

Idea #25

Take advantage of information retrieval services from the Oregon Department of Education.

Advantages

There is no charge for services.

Saves time in searching for information.

Local decisions are made using validated information.

Better decisions result.

Duplication of services is eliminated.

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Section 4

Managing Costs Creatively

Oregon Department of Education
700 Pringle Parkway SE Salem, Oregon 97310

Verne A. Duncan
State Superintendent
of Public Instruction

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Federal law prohibits discrimination on the basis of race, color or national origin (Title VI of the Civil Rights Act of 1964); sex (Title IX of the Educational Amendments of 1972 and Title II of the Vocational Education Amendments of 1976); or handicap (Section 504 of the Rehabilitation Act of 1973) in educational programs and activities which receive federal assistance. Oregon laws prohibiting discrimination include ORS 659.150 and 659.030. The State Board of Education, furthermore, has adopted Oregon Administrative Rules regarding equal opportunity and nondiscrimination: OARs 581-21-045 through -049 and OAR 581-22-505.

It is the policy of the State Board of Education and a priority of the Oregon Department of Education to ensure equal opportunity in all educational programs and activities and in employment. The Department provides assistance as needed throughout the state's educational system concerning issues of equal opportunity, and has designated the following as responsible for coordinating the Department's efforts:

Title II--Vocational Education Equal Opportunity Specialist

Title VI and Title IX--Equal Education and Legal Specialist

Section 504--Assistant Superintendent, Special Education and Student Services Division

Inquiries may be addressed to the Oregon Department of Education, 700 Pringle Parkway SE, Salem 97310 or to the Regional Office for Civil Rights, Region X, 1321 Second Avenue, Seattle 98101.

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INTRODUCTION

This booklet is part of a series entitled, Managing Costs Creatively (MC^2). The series has been developed to provide school district administrators with the experience gained by others facing a decline in resources. Many of the suggestions offered in these pages may bring about greater cost-effectiveness, and even improved productivity. They should not be construed, however, as recommendations from the Department, the State Board nor the State Superintendent.

The material is printed individually by section for the sake of economy, so that each section can be directed to appropriate district personnel. Section 1 discusses the problem of declining funds for schools and solution strategies. Section 2 lists cost-saving tips for district and school-level administration. Section 3 presents cost-saving tips in curriculum, instruction, vocational education, special education, student services and media services. Section 4 lists cost-saving tips for support services: buildings and grounds, maintenance, pupil transportation and food services. Section 5 addresses cost savings for community colleges.

Some cost-saving ideas are described further at the end of the section and are listed in the Table of Contents on the following page. If a suggestion seems appropriate to more than one area, it is presented more than once.

Furthermore, there are approaches to cutting costs that seem to apply to almost any program area. For example:

> Have you considered the skills of your staff outside the areas of their professional training? You may have access to good part-time carpenters, mechanics, etc., or those who could help with drama, music, archery, etc., because of hobbies or other work experience.
>
> Have you considered exchange/trade-off arrangements with local business or industry (e.g., free lunches for volunteers to work with handicapped children, businesses to provide on-site learning settings or "consultants" in exchange for use of school facilities for their employees in the evenings, etc.)?
>
> Networking--Have you considered different avenues of cooperative action between schools, between districts, through ESDs or regional cooperatives for sharing resources (mechanics, repair and maintenance contracts) and for group purchase of materials, supplies or commodities?
>
> Are you utilizing industrial arts classes for construction projects (bookcases, partitions, rebuilding or refinishing furniture)?
>
> Have you fully explored all angles of parent/volunteer involvement--garage sales, flea markets, donations, help as playground supervisors, helping locate used furniture or equipment from business or government offices where they are cutting back?

If you have additional ideas or resources to share with others, please send them to the MC^2 Clearinghouse at the Department. If you have comments or questions, call Don Egge, Associate Superintendent for Policy and Program Development, who is directing the MC^2 project. Telephone 378-8525, or toll free in Oregon 1-800-452-7813, ext. 8-8525.

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SECTION 4

SUPPORT SERVICES

Buildings and Grounds

Energy Conservation

Energy costs have increased astronomically over the past five years, and although the pace has abated somewhat at this time, it is predicted that costs again will increase significantly over the next three years. Effective use of all available energy sources needs to be reconsidered periodically in light of emerging technologies and concepts.

1. In this era of high fuel prices, a comprehensive energy conservation program for the district is an absolute necessity. See the Northwest Energy Educational Management Handbook, March 1980. (Each district received a copy of this document when it was published.)

2. Periodically re-emphasize ongoing energy conservation programs.

3. Ask the local power company to conduct an on-site energy audit of the school building.

4. Ask the mechanical engineer who originally designed equipment for the building to evaluate the effectiveness of heating controls. Large districts might train their maintenance staff to repair the controls for heating and ventilating systems.

5. Save heating costs significantly by starting school earlier in the year (e.g., in the middle of August), and extending Christmas vacation for two weeks before Christmas. Secondary students could seek temporary employment and school maintenance could be accomplished during that time.

6. A few Oregon schools and colleges have heating and ventilating systems controlled by computer; such systems can help make better use of energy.

7. Improve heat energy sources through energy grants. Consider a change from diesel heating fuel to wood pellet, etc.

8. Now that solar technology has improved, installations are proving more cost-effective than originally predicted. For example, swimming pool and shower water can be solar-heated in Oregon from May through mid-October. In this regard, solar system suppliers are becoming more competitive and districts should research all possibilities.

9. Consolidate the use of space, such as closing wings or units of buildings to save on heating and ventilating costs.

10. Continue replacement of incandescent lighting with fluorescent in schools. Although short-term capital expenditures are necessary, fluorescent lighting will reduce costs in the long run.

11. Disconnect electrical appliances (e.g., refrigerators, freezers) during summer vacation.

Use of Buildings

School buildings serve a function--to provide a learning environment--and when the building is not used for that function, it is not working at capacity. Encourage effective building use during the regularly scheduled school day, and all other hours as well.

1. Schedule building space and let groups know when space is available for community use. Have someone on duty one or two nights a week: do not simply leave the building open for use any time. In this way, better use is made of facilities when they are open. (See Cost-Saving Idea #1, page 4-11.)

2. Consider using the high school as a community center, since it is one of the most frequently used buildings in the community. Include a number of activities normally scheduled at the local elementary school. Any fee for using high school facilities could be lower than fees for junior high and elementary schools. This would encourage the community to use those buildings which are opened already and supervised by night custodial staff. (See Cost-Saving Idea #1.)

3. Adult education courses provided in school facilities could be charged the full fee, including utility expenditures. If adult education courses do not pick up this cost, then, in effect, the taxpaying community is subsidizing those who are taking courses.

4. Explore whether the use of facilities by special interest groups is appropriate. You may not want to be accused of subsidizing special interest groups should the district not have the resources to fully fund the basic education program. (See Cost-Saving Idea #1.)

5. Explore the joint use of facilities with other governmental agencies. Allow them to use spaces which are unoccupied at the present time, separating them from areas used by staff and students, and providing separate entrances to the building. Amortize the capital outlay required for remodeling over a five-year period. Share costs of building operations with other occupants. (See Cost-Saving Idea #2, page 4-12.)

Maintenance of Buildings

Deferred building maintenance only postpones the inevitable expenditure of funds. For every maintenance dollar not spent now, probably one dollar and twenty cents worth of maintenance will be needed a year from now. Keep exact records of maintenance that has been deferred and the impact on the instructional program.

1. Districts traditionally have emphasized the need for continuing professional growth of certificated staff through seminars, workshops, and additional academic credit. However, regular training for classified

employees often is overlooked. Continuous employee training and periodic performance reviews are two important techniques for cost savings with custodial and light maintenance personnel. See Public School Survey and Recommendations, March 1969, pp 47-56, by the Business Task Force on Education, Associated Oregon Industries.*

2. Roof maintenance is a very technical matter and funds often are wasted on roofing programs which are not well conceived. Established criteria are needed for the selection of a roofer, particularly when working with built-up roofs. In cases where a roofer has done work for the district previously, determine the quality of that work.

3. Evaluate maintenance costs to determine whether repairs should be done by the staff or on contract; consider the cost-effectiveness of replacement instead of repairs.

4. Contract maintenance and custodial programs.

5. Purchase products which are designed to reduce vandalism.

Cleaning of Buildings

The public expects education to be conducted in a safe and healthy environment, and "healthy" means clean and orderly. While this is an area where savings may be found, overall quality cannot be reduced.

1. A good relationship between custodial and other staff members can effectively cut costs. When classrooms are kept orderly, much less work is required of the custodian. Removal of chalk dust is appreciated by the teaching staff. The teachers should report to the custodian routine maintenance tasks which are needed, and the principal periodically should inspect the buildings with the custodian to see that standards are maintained.

2. A list of technical experts should be available so that district staff can obtain specialized help when it is needed.

3. Factors to consider when contracting for custodial services include cost, the size of the facility, facility construction and the types of programs conducted in that facility. Thoroughly analyze the job responsibilities of current staff to determine where contracted services are warranted; carefully determine whether contracting would impede the flexibility of facility use or staff and student interrelationships with those providing custodial services. Security is yet another consideration. Note: custodial and maintenance services are not defined as "personal services" by the Public Contract Review Board. They must be bid out, and it is necessary to obtain certification of the "going wage rate" from the bidder.

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*On file at the Oregon Department of Education.

4. Use staff development programs to prepare custodial employees to assume added responsibilities.

5. Any changes in the maintenance program or operating schedules need to be agreed upon by the building principal, the custodian, and the central office personnel responsible for the maintenance of all facilities. Simple agreement between principal and custodial staff appears to be creating conflict in a number of school districts, and staff time also can be wasted.

6. Look at major work schedules to determine how much time should be spent on certain tasks. This issue was addressed in the Associated Oregon Industries' report referred to earlier. Establishing uniform time periods required to perform particular tasks should be encouraged.

7. Custodians could work split shifts; that is, they could come to school and open the building, do some preliminary work, go home, and then return to school at the end of the day to do some sweeping. In some school districts, however, custodians must be on hand to watch the operation of a stationary boiler.

8. Clean shops once a week, including home economics rooms. The vocational program areas could be cleaned as part of student training, leaving only maintenance activities to the custodial staff.

9. Science teachers should ask students to clean up the laboratory as part of the program. Equipment should be stored when not in use; custodians should not be expected to work with the equipment due to the possibility of damage.

10. Some of the new floor waxes act as a one-step cleaner and waxer, saving significantly on the cost of stripping floors.

11. Explore the utilization of unemployed individuals to assist with cleaning.

Grounds Use and Maintenance

The community expects to see well-kept grounds: unkept grounds cause a decrease in real estate values and generally detract from the neighborhood environment. Money can be saved even while grounds are kept to the community's satisfaction.

1. Investigate the feasibility of contracting for grounds maintenance.

2. Explore the utilization of community volunteers to maintain flower beds and shrubs on the school grounds.

3. Select low maintenance plantings.

4. Implement an ongoing, efficient program of weed control to avoid problems in this area.

5. Maintain blacktop in good condition; once it is allowed to deteriorate, repairs are costly. A system is needed for regular repair of chuckholes or fractures in the blacktop when they appear.

6. Consider the possibility of allowing large grass fields to go brown during summer.

7. Install low maintenance, yet safe, playground apparatus.

Equipment Use and Maintenance

Maintenance of equipment can be deferred, but this may shorten the life of a given unit. Spending later on capital outlay to replace equipment may be an appropriate cost-saving strategy.

1. When equipment is purchased, find out the availability and cost of repairs. These factors, as well as the cost of a maintenance program available to the school district, should be considered when determining purchases.

2. Develop five-year maintenance schedules, updated each year, noting the activities which need to be carried out during that time and the cost. Some items may need repair once every ten years, others on a yearly basis. (See Cost-Saving Idea #3, page 4-12.)

3. Keep records on maintenance of repair, using a card file on large items of equipment (cost more than $300). The record on each item will reveal when it should be disposed of; some newer items may need costly repairs, while older items may need little maintenance.

4. Train maintenance staff to repair furniture and equipment. Teach furniture refinishing as part of wood shop course, letting students do the work.

5. A process is needed for reporting possible safety concerns to maintenance staff. Deferring maintenance can result in accidents or lost time, preventive maintenance saves costs.

6. Analyze telephone service, evaluating the need for each extension.

Pupil Transportation

Over the past several years, pupil transportation costs have risen at a rate faster than the Portland Consumer Price Index, and faster than most other segments of the educational program as well. There are three primary reasons for this disproportionate increase: a sharp upswing in fuel costs, rapidly expanding transportation needs for special education, and an increase in the number of school districts offering kindergarten programs.

Measures can be taken to reduce expenditures for pupil transportation services, and since the first fuel crisis in 1973, several districts and bus contractors have taken steps to cut costs. There are dozens of ways to save: some yield

immediate results; others call for "front end" expenditures to bring about savings in the long run. A variety of publications and materials on cutting costs have been produced during the last several years, including the Northwest Energy Education/Management Handbook, which presents short- and long-range ideas for reducing fuel costs.

Other idea resources include the annual summer Pupil Transportation Management Workshops, which generally include several sessions on operating transportation systems more efficiently, and school bus newsletters, with their continuous emphasis on cost savings.

Some approaches taken by districts to reduce costs are described below. Any reduction in service should be carefully considered. Above all, safety remains the most important consideration. (See Appendix A, page 4-17 for more ideas, reproduced from the Northwest Energy Education/Management Handbook.)

Routes and Schedules

1. Bus routes should be evaluated periodically to ensure that they are not overlapping one another, and that loads are distributed for greatest efficiency.

2. Larger buses and longer routes may be a consideration.

3. Deadhead mileage can be reduced by adding bus storage areas.

4. Staggering schedules allows for better utilization of buses and drivers. (See Cost-Saving Idea #6, page 4-14.)

5. In a district with a large enrollment in a relatively compact geographic area, staggering class schedules allows for better use of buses and driver time. Less is spent on equipment, storage areas, insurance, driver wages and benefits, training and licensing. A large suburban district found that the number of buses used could be reduced 20 percent through re-routing and by staggering the elementary school starting/dismissal times by one-half hour.

6. The small district covering a large geographic area could eliminate early afternoon routes for primary grade students. While staff and parents may protest the longer school day, the cost advantages are obvious.

7. Scheduling all students for one regular dismissal time can eliminate the need for duplicate runs.

8. Schedule kindergarten students to travel home with older students or eliminate noon runs and ask parents to be responsible for picking up students. Day-long kindergarten on alternating days could be considered, as well as a four-day school week for primary students.

9. Increasing students' walking distance to school and bus stops, while felt by many to be the best way to cut costs, may prove highly controversial, especially in the area of safeguarding students from potential traffic hazards.

Activity Trips

1. The number of trips can be reduced; trips and events can be coordinated so that buses carry full loads.

2. Establishing the minimum and maximum distances allowed for field trips, and making each educational unit or program responsible for trip expenses, can yield savings.

3. See Appendix B, page 4-23, for information on the use of the telexplorer, an amplified telephone developed by the Bell System for conference calls, as a viable alternative to field trips.

4. Consider cutting all field trips.

School Bus Operation

1. Small component districts in a union high district can consolidate fleets; for example, some districts operate on a cooperative basis, others contract with the union high district for services, while still others utilize a single bus contractor in common.

2. Convert from gasoline to propane.

3. Investigate the feasibility of contracting for bus service.

4. Insurance programs should be reviewed and all options investigated for reduced costs for coverage.

Driver Training

1. Driving for fuel economy can produce surprising cost savings. Two fleets utilizing the "decat" system to train drivers have saved 10-15 percent in fuel costs.

2. Promote good driving habits: shorter warmup periods, smooth starts and stops, driving at steady speeds, etc.

3. Use deadhead route mileage and time for driver training; experienced drivers can assist with behind-the-wheel training for new drivers.

Equipment and Maintenance

1. Purchase equipment that provides for the least expense over its entire life. Diesel powered equipment costs more to purchase, but significantly less in terms of fuel and maintenance; many diesel fleets are realizing 40-50 percent reductions in fuel costs, and a considerable reduction in maintenance costs. A thorough study of engine types and sizes in terms of servicing needs also can prove cost-effective. (See Cost-Saving Ideas #4 and #5, page 4-13.)

2. Even though an initial investment for radial tires is more than for other other types of tires, some districts have found them cost effective in terms of increased mileage and reduced fuel and maintenance costs.

3. Electronic ignition systems can reduce maintenance costs by lengthening ignition component life. One district recouped its initial investment within two years.

Food Services

Increasing program costs (purchased foods, supplies, wages, and fringe benefits) continue to force per meal costs up in school nutrition programs. However, charging more for meals is not acceptable to parents, especially in this period of high unemployment and declining income. Given the choice of charging higher prices or underwriting additional costs through the budget, districts have taken a variety of approaches to find a solution:

- Programs can operate on a totally self-supporting basis.
- They can operate within an established budget.
- The district can establish a per meal cost and underwrite all costs above that figure.
- The district can underwrite all costs as a part of the total expense of educating students and serve meals at no charge to students.
- The district may choose to not offer a program.

In operating a nutrition program, a balance between expenses and income may be found by reviewing present practices, and possibly modifying and updating procedures.

1. Plan menus to make full use of commodities. Do a menu item cost analysis and reduce the frequency that high cost items appear on the menu. Cost account the entire menu to establish a balance between production costs and income. Utilize cycle menus, preferably 17-day cycles. Menus which include a high frequency of pre-fab or convenience (processed) items cut sharply into a district's ability to use commodity foods (especially bonus commodity) cost-effectively.

2. Purchase food from a planned menu cycle. Purchase in quantity, as much as storage will allow economically. Avoid "settling in" with one supplier for convenience, as this can be costly. Shop for good prices--food suppliers are in a competitive business and schools represent very desirable accounts.

3. For a cost-effective program, three types of storage area are needed: frozen, cold, dry. Keep inventories in each area current as food is received and used. Store items most often used towards the entrance, least used in the rear. A security system will help avoid losses. Temperature controls for the frozen and cold storage areas should be safe-proofed. Mice, insects and dampness contaminate food, and precautions are relatively inexpensive when compare to the costs of food lost.

4. A good cost accounting system is essential; otherwise, large and unexpected deficits may occur. Cost accounting must be done at the building level, through the food service director and business manager. Building level managers, once informed and involved, can play a major role in controlling costs and maintaining quality.

5. Many school districts in Oregon have "turned around" their school food service programs with the help of the film training program, "Efficient School Food Production." This series is available from all ESDs at no cost to districts. The films provide training in every skill necessary for the preparation of quality foods. Some districts are considering this training as a prerequisite to employment and salary increases. It is timely, appropriate, and indeed a financial necessity that classified food service personnel contracts include nonpaid training requirements.

6. Production records are the best safeguard from the over- and underproduction of food. Overproduction drives up per meal costs; underproduction reduces income and discourages participation. Production records are essential to accurate planning. They are an excellent communication tool between the building level manager, district food service director, business manager, and superintendent. The records also are an excellent way for certifying compliance with federal, state and local standards as to portion size.

7. Full use of USDA donated commodities, regular and bonus, is resulting in 36¢ per meal savings in some districts. Others utilize commodities at a much lesser per meal rate, which increases their per meal costs significantly.

8. A lunch period that is truly a lunch period is advisable. Scheduling numerous activities at that time decreases participation in the lunch program. The lunch period should be long enough to allow time for all students to be served and to eat. The staggering of lunch periods has helped increase student participation in the school nutrition program of many schools. And the food service program will become an integral part of the total educational program when students are helped to learn good nutrition habits.

9. When pricing meals, students should be charged the actual cost of per meal preparation less the total of: state matching per meal revenue plus federal per meal reimbursement, plus federal commodity per meal value. If the local school district elects to underwrite a portion of the cost, that too should be deducted from the price established for the paying student. All adults should be charged at least the actual cost of per meal preparation. For example: if five adult employees eat lunch at $1.50 per day (actual per meal cost of preparation), the cost to the district (5 x $1.50 x 183) is $1,372.50 per year.

10. School districts should avoid having income siphoned from school food services to others during the lunch period, such as student stores, vending machines, food sales, etc.

11. School nutrition program income comes from basically five sources: monies from paying students and adults, federal reimbursement, federal donated commodities, state matching monies, local school district subsidy. Increased average daily participation increases income in the first four categories. "Good food and good service" are the keys to increasing participation.

COST-SAVING IDEAS

Buildings and Grounds

Idea #1

Often, several buildings in a school district are open on the same night, with only a minimum of student or community activities scheduled for each. Scheduling activities in the fewest number of buildings practicable saves custodial and energy costs. However, you may wish to continue the practice of scheduling activities in the neighborhood elementary school if the activity is serving the needs of students enrolled exclusively in that school.

Advantages	Makes best use of one or a few buildings; encourages better supervision and security.
	Reduces energy costs for light and fuel, and reduces custodial costs.
	Improves public relations with special custodians and supervisory personnel in the buildings used.
	Less disruption of the cleaning schedule in schools used least.
Disadvantages	Increases wear and tear on buildings used most frequently.
	Creates public inconvenience in terms of distances traveled.
	Requires more administrative time for scheduling.
	Creates parking problems when facilities used are limited.
	May incur comment that facilities in a certain school are not readily available.
Additional Information	The building(s) assigned to night utilization could be cleaned on a graveyard work shift. The swing shift custodian would be given special training for handling public groups.
	Senior high schools have both specialized and general-use areas. There are fewer specialized areas in junior high and elementary schools.
	A graduated fee schedule could be initiated, with a higher charge at the schools designated for minimum night use and a lower charge for the maximum-night-use schools. Charges should be established realistically on the basis of actual cost analysis. Reduced rates to special groups actually subsidizes those groups through tax dollars. Activities for children, such as scouting and campfire, may be given special consideration.

Idea #2

Lease or rent surplus building space. Declining school populations in many districts mean that some school buildings are not being used to their capacities. Extra income can be earned by school districts if they rent or lease the vacant space in these school buildings.

Advantages	Earns extra income.
	Uses all available space.
	The public perceives the district as making "good use" of available resources.
Disadvantages	Renting out space may reduce available program options.
	The mixing of uses may not be compatible.
	The costs incurred when renting the space may be greater than the income.
Additional Information	The potential earning power of a given space depends upon such factors as parking, building age, and location. Contact a local commercial real estate firm for estimates of earning potential.

Idea #3

Equipment and facilities owned by school districts should be maintained according to a five-year schedule.

Advantages	Avoids costly breakdowns of equipment or building closures.
	Uses resources more efficiently.
	Extends equipment and building life.
Disadvantages	Staff time required to operate the program may be more costly than the results.
	Schedules may not be adhered to during times of diminishing resources.

Idea #4

Many fleets in Oregon are purchasing diesel powered buses whenever replacement or additional vehicles are needed. Of all buses (over 60-passenger capacity) purchased in 1981, 59 percent were diesel. Converting existing buses from gasoline to diesel does not appear to be feasible, except for the larger, transit-type buses.

Advantages

Yields 50 to 100 percent more miles per gallon. Several fleets claim between two and three times the number of miles with diesel for each hour of engine maintenance.

Cost of fuel is generally lower; 25 to 50 percent fuel cost reduction.

Maintenance costs are lower.

Engine life is longer, especially with high mileage usage.

Disadvantages

Initial cost high: a diesel engine can cost from $3,600 to $6,000 more than a gas-powered engine. However, districts indicate an 18- to 36-month payback.

The additional weight may require heavier suspension components. Heavier components, however, should provide a savings over the lifetime of the bus.

Mechanics may need retraining.

Additional fueling equipment may be required.

Fumes and engine noise can prove objectionable.

Resources

Information is available from manufacturers of mid-range diesels; fleet operators who have been using diesel-powered equipment also can be consulted.

Idea #5

During the past school year, several fleets have converted some of their buses from gasoline fuel to propane, and most indicate that properly converted vehicles yield cost savings. There are many regulations, approvals and permits which are required when converting to propane, and there is some concern that propane's price advantage will be reduced if natural gas is deregulated by the federal government.

Advantages	Fuel costs are reduced by 20 to 40 percent
	Propane has a higher octane rating than gasoline.
	Cleaner burning fuel, less pollutants
	Engine components and oil last longer.
Disadvantages	"Front end" cost to convert vehicles; conversion can affect vehicle warranty and product liability.
	Reports indicate 5 to 20 percent less mileage per gallon of fuel; some drivers have indicated a small power loss, particularly on hills.
	Additional fueling facility required; training needed for maintenance personnel and those responsible for fueling buses.
	Problem locating fueling stations while enroute.
Additional Information	Costs for conversion can run from $800 to $1,400 per vehicle. Reports indicate recouping initial conversion costs between one and two and one-half years after conversion.
	Propane storage tank and fueling equipment required; costs vary according to tank size and location.
	Regulations and information regarding installation requirements can be obtained from the State Fire Marshal's Office and the Department's Pupil Transportation Services Office.

Idea #6

Additional starting and dismissal times allow for increased utilization of existing buses, resulting in significant savings. This is effective mainly for schools which have attendance areas small enough to allow for trips to be completed in 40 minutes or less and which have a sufficient number of students to fill the buses.

Advantages	Better utilization of buses.
	Reduced service levels for students not necessary.
	Produces immediate cost savings without initial implementation cost.
	Less equipment and storage needed.

Disadvantages — Rescheduling the starting and dismissal times can result in reactions from staff, students, and parents.

Complaints may arise if pickup or drop-off times are scheduled during winter months when it is dark.

Additional Information — Costs significantly reduced, less new equipment needed, less information needed, lower cost for driver licensing and training, possible savings on drivers' wages and benefits. Several districts have utilized this approach to reduce transportation costs; one large metropolitan district hopes to cut back on regular route buses by approximately 20 percent.

Professional consultants are available to review programs and suggest cost savings measures. General information can be obtained from the Department's Pupil Transportation Services Office.

Idea #7

Consolidation of fleets is an approach used by several districts to reduce transportation costs; this is particularly effective in union high school districts or in relatively small geographic areas where there are two or more adjoining districts. Combining bus fleets on a contractual or cooperative basis allows for the use of equipment on regularly scheduled routes by more than one district.

Advantages — Reduction in the number of buses needed.

Increased utilization of equipment.

Can increase the size of a fleet to justify the employment of full-time transportation supervisory personnel and to operate an effective bus maintenance program.

More efficient use of drivers' time.

Can save on driver training expense by utilizing just one certified driver trainer to serve the entire fleet.

Disadvantages — Possible changes in starting and dismissal times.

Lack of flexibility for individual schools due to the need to coordinate route schedules.

Possible difficulty in determining component share of transportation expense.

Could limit the number of buses available for extra trips.

Possible reactions from staff and parents if schedules are changed.

Additional Information: Agreements or contracts need to be negotiated to establish operational responsibilities and methods for determining respective costs.

In almost every instance, there has been a reduction in overall cost for transportation service without increased expenses to implement the program.

Resources: Districts which have consolidated fleets or contacted services are the best resource for information.

Idea #8

Since only certain types of pupil transportation are required, it is possible to eliminate most of the school bus programs in the majority of districts; at least two districts have done this in recent years. Because an average of only half of a typical district's students are transported, most districts can muster a majority to support the elimination of pupil transportation. However, in some districts where transportation has been eliminated or walking distances have been extended significantly, parent reaction has been strong, especially during winter months. Since Basic School Support reimburses local districts for approximately 50 percent of approved transportation costs, eliminating programs results in a savings of only 50 cents on the dollar.

Advantages: Can save the taxpayers approximately 50 cents on each dollar spent for transportation.

Disadvantages: Due to the transportation apportionment law, savings would not be realized until the second year following curtailment.

Can result in strong adverse parental reaction, particularly when students are denied transportation or are required to walk greater distances to bus stops.

Can split parental support for schools, as only half of the student population will be affected in the typical district.

Can cause problems if transportation is curtailed and the athletic program retained.

Possible hardships for families without access to transportation or funds to pay for transportation.

More fuel and energy required if parents transport students on an individual or carpool basis.

Resources: Information can be obtained from schools which have eliminated regular school transportation services.

APPENDIX A

ENERGY CONSERVATION*

Energy conservation in school transportation is a major area of concern to the educational community. School buses travel in excess of four billion miles annually, consuming 900 million gallons of fuel and transporting 55 percent of the school enrollment.

Since the energy crisis descended, school transportation managers have initiated efforts to reduce the amount of fuel required to operate their fleets. Rapidly escalating fuel prices and limited school budgets are forcing a strong stand for conserving energy.

Here are 101 ways transportation can conserve energy and reduce transportation costs.

Transportation Policy

1. Coordinate school calendars and start and dismissal times between schools of each school system.
2. Eliminate staggered dismissal times in the same building.
3. Increase requirements for walking distances to school and to bus stops.
4. Establish take-up and dismissal schedules at schools to support maximum vehicle utilization.
5. Eliminate buses for detention students.
6. Limit student parking, encourge high school pupils to ride school buses, form car pools, etc.
7. Establish maximum distance for cocurricular trips (60 miles round trip).
8. Utilize public mass transit where feasible to avoid duplication of service.
9. Establish travel restrictions for school sponsored activities supporting athletic teams. (Cheerleaders, band, pep clubs, etc.)
10. Eliminate buses for athletic team practices.

*Reproduced from Northwest Energy Education/Management Handbook, March 1980.

School Bus Operation: Activity and Field Trips

1. Reduce or eliminate all but the most necessary athletic contests.
2. Reduce or eliminate all but the most necessary cocurricular trips.
3. Combine cocurricular and athletic trips for more than one school.
4. Have districts share buses when feasible.
5. Establish minimum and maximum distances for all trips.
6. Limit cocurricular trips to full bus loads only.
7. Combine athletic schedules so several games can be played at the same time.
8. Encourage parents to pool with other parents in transporting children to school for late activities and for extracurricular activities.
9. Contract with parents to provide transportation when feasible.
10. Utilize public transportation on return trips where feasible rather than return school buses to schools or homes.

School Bus Operation: General

1. Lengthen distances between pick-up points.
2. Establish collection points.
3. Plan stops on level instead of on inclines.
4. Consolidate loads.
5. Plan routes to make only right-hand turns, to save on idling time, where safety permits.
6. Use intercoms on buses to reduce stops for controlling discipline.
7. Install trip recorders to record and monitor driver and vehicle operation when necessary.
8. Use smallest available vehicle for long distance, light-load runs.
9. Install two-way radios to direct operation or redirection of buses to avoid unnecessary use.
10. Route buses to stay on main roads as much as possible.

School Bus Routing and Scheduling

1. Fill buses to legal capacity.

2. When replacing buses or expanding fleet, purchase buses with capacities to provide balanced fleet utilization.

3. Utilize proven updating routing techniques, either by hand or computer to maintain maximum vehicle utilization at all times.

   a. Evaluate current system.
   b. Revise system to reduce mileage, stops, and student riding time and distance.
   c. Review policy and revise where needed.

4. Consolidate interdistrict transportation systems when possible to meet special transportation demands.

5. Develop an alternate routing plan for implementation in emergencies and fuel shortages.

School Bus Operation: The Driver

1 Retain experienced drivers as long as possible.

2. Re-educate bus drivers toward better fuel economy.

3. Reduce warm-up time on buses to 2 minutes initially, and 3 minutes prior to starting routes. Driver should dress warmer rather than running engines at full idle to heat buses.

4. Drive slowly the first few miles until vehicle warms up.

5. Avoid full throttle operation. Drive at steady speeds.

6. Avoid the "red line" even in shifting gears.

7. Drive slowly back to bus garage. Turn corners slowly.

8. Reduce speed limit to as low as practical.

9. Avoid courtesy stops. (Unauthorized)

10. Train new drivers on existing runs while bus is "deadheading."

11. Use simulators to reduce behind-the-wheel training in vehicles.

12. Increase frequency of driver inservice programs.

13. Hold joint workshops with drivers and mechanics to improve transportation operation.

14. Use an incentive system for reducing vehicle fuel consumption.

15. Review driver times and routes. Determine most efficient vehicle utilization, lapover and storage plan to minimize miles for school as well as personal vehicles.

16. Keep foot off accelerator when the bus is stopped and off brakes when in motion. Reduce braking by anticipating stops.

School Bus Maintenance

1. Tune and maintain engines, plugs, points and timing.

2. Maintain and clean pollution controls.

3. Keep gas tanks full to avoid excessive evaporation.

4. Avoid fuel spillage when refueling buses. Do not "over fill."

5. Replace buses that use excessive amounts of fuel as soon as economically feasible.

6. Keep gasoline tanks locked with one person in charge of fueling of buses and other school vehicles.

7. Keep accurate bus records for maintenance and fuel consumption.

8. Analyze record data for potential management decisions to achieve savings.

9. Inventory all parts and supplies and order for a full year on a planned-need basis, with best price on past experiences. (Reduces "parts chasing.")

10. In winter keep all buses under cover rather than allowing drivers to take home and park.

11. Use engine warmers for easier starts.

12. Maintain clean oil and air filters.

13. Keep automatic choke clean. A sticking choke will waste fuel.

14. Keep air-fuel mixture or carburetor precisely adjusted.

15. Regulate oil change with engine tune-up.

16. Use manufacturer's recommended weight of oil. A heavier oil will force the engine to use more fuel, too light will not provide the protection required.

17. Check tire balance and wheel alignment to avoid "drag" which will use more fuel and shorten tire life.

18. Check radiator thermostat. A defective thermostat may prolong engine warm up, increasing fuel consumption.

19. Use proper octane rated fuel. Using wrong octane will result in plug foul up and reduction of mileage. Using a higher octane than required is a waste of money.

20. Use engine analyzing equipment to assure maximum efficiency.

21. Make full utilization of service manuals and maintenance bulletins to keep updated on maintenance techniques.

22. Take full advantage of free maintenance training clinics conducted by skilled instructors.

23. Keep brakes properly adjusted.

24. Repair engine oil leaks.

25. Install radiator shutters for retaining engine heat.

26. Install radial tires.

27. Retrofit ignition with electronic ignition system.

28. Properly utilize proven fuel and oil additives.

29. Maintain proper tire pressure.

30. Utilize new techniques such as rubber suspension systems, wheel balancers, tire pressure equalizers, solid state ignition, etc.

Transportation Office and Garage

1. Maintain lighting fixtures (a clean fixture in good working order can deliver up to 50 percent more light).

2. Clean walls and ceilings and/or paint with light flat or semigloss finish.

3. Turn off all lights and other electrical equipment when not in use.

4. Reduce exterior lighting to lowest level consistent with good security and safety.

5. Perform janitorial services earlier so that electricity may be turned off earlier.

6. Check all equipment and motors. Adjust belts for proper tension; turn off when not in use.

7. Limit the use of electrical space heaters.

8. Tighten and clean all electrical connections from the circuit breakers back through the transformers to the main switch. (Should be done annually by an experienced electrician when building power is off).

9. Consider the installation of photo cell controllers to turn exterior lights on and off.

10. Concentrate evening work/meetings in a single heating/cooling zone instead of heating or cooling the whole office or garage.

11. Clean up heat exchanger and heating oil surfaces for better heat transfer, change filters at regular intervals, clean fan blades and damper blades.

12. Request visitors and staff to avoid introduction of adverse conditions by by opening windows or holding open doors.

13. Consider the installation of added insulation to building walls and ceiling to decrease heat transfer.

14. Consider the installation of insulating glass in place of single pane glass.

15. Consider the installation of weather-stripping, caulking, automatic door closers, etc., to decrease infiltration of outside air.

16. Close off all unnecessary openings--unused exhaust fans, broken windows, structural openings.

17. Replace grossly oversized motors. Motors operate more efficiently near rated capacity and with a better power factor.

18. Utilize blower system to circulate warm air from the ceiling to floor of work areas.

19. Remove thermostats located near doors, windows or heat producing sources.

20. Reduce thermostat setting on weekends, holidays and at night.

APPENDIX B

"Managing Costs Creatively: Telexplorer"*

With cuts in federal funds, basic school support and recent levy and tax base failures, educators are asked to reduce expenses without a loss of quality in the education being delivered. Field trips and travel are areas which have been particularly vulnerable to increased costs and, as a consequence, vulnerable to budget cuts. Yet these are important to the education of your students and the administration of your district.

There is a way to reduce field trip and travel costs significantly without giving up the benefits of either. How? By applying the concept of Telexplorer: using telephone equipment designed for use with groups, like classes or groups of teachers, to replace some or all field trips and travel to meetings. What makes this equipment practical is its low cost, portability and effectiveness.

Field trips cost, on the average, between $125 and $150 each. These trips are often more expensive, or impractical, for rural districts because of the time, distance and cost involved. Field trips by phone, Telexplorer, is not designed to directly replace all trips. For example, a trip to the coast for students from Eastern Oregon could not be replaced with Telexplorer. However, if the budget did not have room for the trip, a call to a regional oceanographer or coastal fishing company would serve to educate students about problems facing the coast.

Telexplorer works best when it makes completely new experiences possible. A class in government gains new insights when they talk to their legislators, in Salem or Washington, DC, visits that travel time and cost would otherwise make impossible. Telexplorer becomes an integral part of the curriculum. For example, an English class reads and discusses a book. They also discuss how a writer writes. The next step is a Telexplorer call to the author. Students have prepared for this so they can ask questions about writing and the book. The call could be followed up with a creative writing project using what they learned talking to the author.

Telexplorer must be a planned tool to be effective, just like any field trip. It is a very cost-effective way to bring resources to the classroom. People active in specific fields related to curriculum, professionals for career education and college placement officials are just some of the resources available with Telexplorer.

The telephone equipment is simple to use, portable, easy to set up and, most important, inexpensive. A Portable Conference Telephone which includes a speaker and two external microphones designed for use with classroom sized groups and currently leases for less than $15 a month. Your only other expense is the cost of any long distance calls. For example, a 40 minute call from Pendleton to Salem costs only $19.21.

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*Written by Pacific Northwest Bell Company for the Mc^2 project; contact Hugh Kelly, 242-3451.

To manage costs creatively, it is vital that districts maximize all available resources. This includes the Telexplorer program. The program can reduce travel costs associated with district administration. Administrative meetings, meetings with consultants, staff interviews, and inservice training can all be done with the Telexplorer equipment. This reduces costs associated with those meeting while maximizing one of your most cost-effective resources.

The benefits extend beyond the important dollar savings. Time is saved thereby improving productivity. People who are out of town could still attend an important meeting via Telexplorer. Depending on your district's needs, remote and homebound instruction could be added to your program.

Pacific Northwest Bell provides this service, as well as materials and training ncessary for a successful Telexplorer program. Please call for more information.

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Section 5

Managing Costs Creatively

Oregon Department of Education
700 Pringle Parkway SE Salem, Oregon 97310

Verne A. Duncan
State Superintendent
of Public Instruction

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Federal law prohibits discrimination on the basis of race, color or national origin (Title VI of the Civil Rights Act of 1964); sex (Title IX of the Educational Amendments of 1972 and Title II of the Vocational Education Amendments of 1976); or handicap (Section 504 of the Rehabilitation Act of 1973) in educational programs and activities which receive federal assistance. Oregon laws prohibiting discrimination include ORS 659.150 and 659.030. The State Board of Education, furthermore, has adopted Oregon Administrative Rules regarding equal opportunity and nondiscrimination: OARs 581-21-045 through -049 and OAR 581-22-505.

It is the policy of the State Board of Education and a priority of the Oregon Department of Education to ensure equal opportunity in all educational programs and activities and in employment. The Department provides assistance as needed throughout the state's educational system concerning issues of equal opportunity, and has designated the following as responsible for coordinating the Department's efforts:

Title II--Vocational Education Equal Opportunity Specialist

Title VI and Title IX--Equal Education and Legal Specialist

Section 504--Assistant Superintendent, Special Education and Student Services Division

Inquiries may be addressed to the Oregon Department of Education, 700 Pringle Parkway SE, Salem 97310 or to the Regional Office for Civil Rights, Region X, 1321 Second Avenue, Seattle 98101.

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INTRODUCTION

This booklet is part of a series entitled, Managing Costs Creatively (MC^2). The series has been developed to provide school administrators with the experience gained by others facing a decline in resources. Many of the suggestions offered in these pages may bring about greater cost-effectiveness, and even improved productivity. They should not be construed, however, as recommendations from the Department, the State Board nor the State Superintendent.

The material is printed individually by section for the sake of economy, so that each section can be directed to appropriate district personnel. Section 1 discusses the problem of declining funds for schools and solution strategies. Section 2 lists cost-saving tips for district and school-level administration. Section 3 presents cost-saving tips in curriculum, instruction, vocational education, special education, student services and media services. Section 4 lists cost-saving tips for support services: buildings and grounds, maintenance, pupil transportation and food services. Section 5 addresses cost savings for community colleges.

Some cost-saving ideas are described further at the end of the section and are listed in the Table of Contents on the following page. If a suggestion seems appropriate to more than one area, it is presented more than once.

Furthermore, there are approaches to cutting costs that seem to apply to almost any program area. For example:

> Have you considered the skills of your staff outside the areas of their professional training? You may have access to good part-time carpenters, mechanics, etc., or those who could help with drama, music, archery, etc., because of hobbies or other work experience.
>
> Have you considered exchange/trade-off arrangements with local business or industry (e.g., free lunches for volunteers to work with handicapped children, businesses to provide on-site learning settings or "consultants" in exchange for use of school facilities for their employees in the evenings, etc.)?
>
> Networking--Have you considered different avenues of cooperative action between schools, between districts, through ESDs or regional cooperatives for sharing resources (mechanics, repair and maintenance contracts) and for group purchase of materials, supplies or commodities?
>
> Are you utilizing industrial arts classes for construction projects (bookcases, partitions, rebuilding or refinishing furniture)?
>
> Have you fully explored all angles of parent/volunteer involvement--garage sales, flea markets, donations, help as playground supervisors, helping locate used furniture or equipment from business or government offices where they are cutting back?

If you have additional ideas or resources to share with others, please send them to the MC^2 Clearinghouse at the Department. If you have comments or questions, call Don Egge, Associate Superintendent for Policy and Program Development, who is directing the MC^2 project. Telephone 378-8525, or toll free in Oregon 1-800-452-7813, ext. 8-8525.

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SECTION 5

COMMUNITY COLLEGE ADMINISTRATION

For several years, community college administrators in Oregon have found it necessary to take steps toward reducing costs. Cost-cutting has tended to occur in a pattern,* beginning with searches for new sources of income and increased productivity to meet revenue shortfalls. When such steps have not been sufficient, expenditures have been deferred, and then services have been reduced. When all of this has proved inadequate, dramatic reductions in services have been required. In 1982 several districts reached the latter stage, when state and local economic conditions worsened.

The following cost-saving measures indicate the variety of ideas which have been tested or are being considered on the community college campuses.

Increased Revenue, Productivity or Efficiency

New sources of revenue--

1. Charge laboratory fees for computer programming and other courses usually not considered lab courses.

2. Establish fees for catalogs, transcripts, job search workshops and parking.

3. Pursue private donations for such purposes as "endowed chairs," new facilities, and scholarships.

4. Open an electronic games center on campus, committing profits to intercollegiate athletics.

5. Eliminate third-party food services arrangements, opting to run the service with district employees or to use vending machines exclusively.

6. Revoke senior citizens' tuition waiver policy.

Productivity and efficiency efforts--

1. Combine small departments; eliminate some department head positions; place greater responsibility on associate deans for direct supervision.

2. Share employees with other agencies, such as school districts and city and county governments.

3. Disconnect and reduce the number of telephone lines on campus.

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*The pattern is described in more detail in Section 1 of this MC^2 series, page 1-11.

4. Consider a private telephone system, independent of the Bell System.

5. Contract for bookstore operations, custodial services, grounds keeping and other services if cost-savings can be effected.

6. Utilize volunteers for tutoring, grading papers and other services.

7. Improve accident prevention efforts to reduce SAIF premiums. (See Cost-Saving Idea #1, page 5-9.)

8. Utilize Criminal Justice students as security guards for the campus.

9. Review and analyze forms used on campus, eliminating some, consolidating others.

10. Encourage energy conservation:

    - Initiate an intensive weatherization program for doors and windows.
    - Reevaluate lighting in all buildings: remove some night lights and reduce lighting where light of reading intensity is not needed.
    - Investigate the feasibility of installing a computer-assisted energy management system.
    - Place solar panels on building roofs to supplement space heating and hot water production.
    - Monitor temperature in facilities, seeking energy savings where possible.
    - Change outside campus parking lights to high presence sodium.
    - "Last one out, please turn out the lights!"

Deferred and/or reduced expenditures--

1. Place a freeze on all out-of-state travel and reduce out-of-district travel dramatically.

2. Avoid hiring a replacement for personnel on sabbatical leave.

3. Close the campus on Friday and Saturday during summer term.

4. Place a freeze or strict review process on hiring employees to replace those leaving the institution.

5. Utilize staff development and training to prepare current employees to accept new or added responsibilities.

6. Offer early retirement packages for faculty, administrators and classified staff.

7. Postpone solar energy efforts, thus avoiding start-up costs which have a slow pay-back.

8. Defer replacement of aging equipment, frayed drapes, worn carpets, etc.

Reduced services across-the-board--

1. Arrange for all staff members (administrative, classified, support, etc.) to take one unpaid day of leave per month as agreed with immediate supervisor.

2. Reduce the contracts for administrators, instructors and classified staff by ten working days per fiscal year. (See Cost-Saving Idea #2, page 5-9.)

3. Require that the summer months of all twelve month appointments be "self-supporting."

4. Consider a four-day class schedule and work week during the academic year.

5. Close the campus for one or two weeks between summer session and fall term, and furlough staff.

Elimination or dramatic reduction of programs or administrative functions--

1. Streamline the organization by eliminating one or more deanship.

2. Eliminate full-time faculty positions in areas of low enrollment such as foreign languages, music.

3. Implement a reduction in force plan derived through a zero based budgeting process.

4. Freeze or restrict the hiring of part-time instructional staff, thus reducing course offerings in developmental education, adult self-improvement and other areas.

5. Limit summer school facilities and offerings to one campus.

6. Eliminate summer session entirely.

Curriculum and Instruction

Many options are being considered by Oregon's community college districts to maintain the quality and flexibility for which they are known while they also respond to financial crises. Some of the options are described here.

Curriculum

1. Provide ongoing review of course offerings to determine their viability for: programs, community needs, course needs, course enrollments, comparative cost effectiveness, budgetary considerations, etc.

2. Offer some transfer courses on an alternate year basis.

3. Increase average class size: (1) offer some classes less often during the year, (2) cancel small classes quickly and advise students into other classes, and (3) change program requirements with fewer choices to students.

4. Give instructors the option to teach fewer students for less pay, down to a predetermined minimum.

5. Shorten fall and winter terms to eight weeks, and spring term to six weeks. Attendance may improve, instructors may remove any nonessentials from course work, and the programs may become stronger at less cost.

6. Contract with local school districts to operate programs with low enrollments. Costs could be shared and there would be less duplication of equipment purchases.

7. Share instructors with nearby college districts through teleconferencing. Low enrollment classes and programs can be filled at one-half the cost of instruction.

8. Eliminate instructional programs in small communities unless the number of tuition-paying students provides for full cost of offerings.

9. "Double-list" course offerings in small communities (credit/noncredit). The community education programs could handle the delivery of services, while the academic departments would be responsible for program quality.

10. Secure a volunteer community coordinator to plan schedules in small rural towns; provide the volunteer with free classes in return.

11. Close a center if an alternative nearby can provide the same service.

12. Secure charitable agency funding to offset the cost of classes of direct interest or benefit; e.g., March of Dimes for childbirth preparation, teen parenting, prenatal care.

13. Contract for services with businesses and agencies to reduce costs and dependence on FTE. Offer courses, seminars and workshops on a cost-plus basis.

Instruction

1. Develop differentiated staffing for resource centers, such as a differentiated math resource center. The centers would allow for self-paced instruction, flexible course content and scheduling, open-entry, and low-cost instruction.

2. Assign administrators to duties in instruction or instructional support.

3. Investigate classes offered, particularly laboratory classes, to see if all levels could be taught in the same class. Some examples: (1) Drawing Classes I, II, and III or (2) field labs of similar or closely related courses, such as Silviculture and Logging Methods. (The second example also has the advantage of teaching the interrelationships of courses.)

4. Car pool all field trips instead of using college vans, passing on the cost to the students.

5. Utilize students to grade their own work and record the grades.

6. Use advanced students for peer tutoring.

7. Utilize volunteer tutors. Expand the tutor coordinator's role to include recruiting and training volunteer tutors for specific assignments.

8. Contact local service clubs and seek sponsorship of classes in ESL (English as a Second Language), Adult Basic Education, etc.

Media

1. Telecourses can be used to provide instruction to students in the outreach areas and will allow for additional flexibility on campus. Courses can be offered via cable or PBS. Local school districts could use telecourses to augment district staff; e.g., science and computer courses.

2. Organize a community college consortium for audiovisual software. This group would coordinate the purchasing, renting and loaning of audiovisual software among community colleges. The group also could join the Oregon Educational Computer Consortium.

3. Utilize an Apple II microcomputer for test review, test generation, and recordkeeping for telecourses. The savings in teacher time used for generating tests would be significant.

4. Increase or initiate use of computers for instruction in developmental education, as well as recordkeeping.

5. Freeze spending for equipment, library books, materials, supplies, and outside services.

6. Change video format from 3/4-inch and 16mm to 1/2-inch. The 1/2-inch format is approximately 30 percent less expensive than 3/4-inch, and approximately 75 percent less expensive than 16mm.

7. Reduce the number of telephones on each campus.

Student Services

The purpose of student services is to help students pursue their educational goals, through counseling, financial aid, etc. Community colleges have considered cost-saving ideas which may involve changes in existing methods, streamlining traditional programs or even changes in delivery of services. Some of the ideas are described here.

Reduced Services to Students

1. Instead of mailing grades to students, have students who are in school the next term stop by admissions to pick up grade sheets. Those who wish them mailed could be asked to provide a stamped, self-addressed envelope.

2. Eliminate tuition waivers for student body officers and immediate family members of staff. If this is part of the collective bargaining agreements, contracts would have to be renegotiated.

3. Operate selected sports and activities on a club basis, funded by user fees or private organization sponsorship, thus removing them from the general fund budget. This could encourage initiative and responsibility on the part of participants.

4. Eliminate athletic competition in golf, tennis, cross-country, etc. Fund the remaining program with vending machine revenue as supported by student government.

5. Eliminate talent grants. (This would reduce the enrollment of students needing such tuition assistance.)

6. Discontinue student services as a separate program, requiring that the faculty accept more responsibility in guidance and counseling.

Restructured Student Services

1. Assign counselors to teach classes in career planning, job search, test anxiety, study techniques, etc. This could result in less one-on-one counseling.

2. Use students to help in replacing or supplementing classified positions.

3. Ask every student to donate some work time to the college, even if it is only a few hours per term for part-time students. This may not cut custodial or maintenance costs, but would help accomplish a variety of tasks.

4. Allow students to barter for waived tuition. In return for "X" number of hours of work for the college (i.e., maintenance, clerical support, lab assistance, etc.) they could be allowed to enroll in "X" number of credit (or noncredit) courses at no charge. (See Cost-Saving Idea #3, Page 5-10.)

Streamlined Student Services

1. Consolidate use of Career Information System in a cooperative effort by ESDs, public high schools, and community colleges. This would lower the cost per institution.

2. Implement a year-long computer produced schedule. Students could plan their school work schedule for the academic year, but there would be less flexibility.

3. Revise office procedures so that all registration material is input to the central computer by the field offices.

4. Computerize the student services area, including (1) on-line registration with associated list generation, (2) financial aid and veterans, (3) follow-up, (4) self-help advising/scheduling/career analysis. This would encourage accurate monitoring of programs, reduce staff needed for clerical/routine functions, and release professional time to perform professional functions.

5. Review other college publications concerned with registration to determine whether their formats are less costly to produce and mail.

6. Replace the annually printed and bound Adviser's Handbook with a three-ring binder into which a loose-leaf handbook, and other documents related to academic advising are placed. Replace annually only those portions which need revision. (See Cost-Saving Idea #4, Page 5-10.)

COST-SAVING IDEAS

Idea #1

Increase accident prevention efforts, especially in high risk areas, focusing on job safety and safety training materials. The result should be a decrease in on-the-job accidents.

Advantages	Fewer lost work days.
	Savings in annual Workers' Compensation insurance premium costs. One community college has realized a savings of more than $150,000 in a three-year period.
	May result in a better work environment for all employees and enhance employee morale.
Additional Information	Clearly, it is important that the SAIF retro payment plan be continued.
	Any safety program requires the continued support of staff and administration.

Idea #2

Reduce the contracts for administrators, instructors and classified staff by ten working days per fiscal year.

Advantages	Savings would be significant, yet the reduction in time would not necessarily have a drastic effect on college operations or instruction.
	Avoids layoff of personnel.
Disadvantage	All staff would receive ten (10) days less pay.
Additional Information	The cooperation of both the classified and professional unions would be helpful in implementing this plan, or else the board would need to declare a financial emergency.

Idea #3

Allow students to barter for waived tuition. In return for "X" number of hours of work for the college (i.e., maintenance, clerical support, laboratory assistant, etc.), they could be allowed to enroll in "X" number of credit (or non-credit) courses at no charge.

Advantages

Classes would be available to students otherwise unable to afford the instruction.

Maintenance of buildings would be accomplished, perhaps at less cost.

Work experience would be gained by students who might otherwise have none.

Students would take more pride in their college by being an active part of it.

Disadvantages

Administrative time would be needed to establish and monitor the program.

Safeguards against poor performance would be needed. Forms would need to be developed and the business office would need tuition waiver procedures.

Additional Information

Probably one full-time employee's time would be needed to approve bartering plans, monitor performance of the agreed upon tasks, and arrange tuition-free enrollment. Tasks which would qualify for the barter system would have to be clearly defined and procedures developed.

It would probably be most effective if students worked prior to enrollment in class to build up the "work credit." This would eliminate problems with noncompletion of the barter agreement.

Idea #4

Replace the annually printed and bound Adviser's Handbook with a three-ring binder into which a loose-leaf handbook, and other documents related to academic advising are placed. Replace annually only those portions which need revision.

Advantages

Reduced staff time in preparing copy for the handbook with only an initial outlay of money, time, and energy.

Reduced cost of printing and binding.

Easier and faster updating of handbook contents.

More flexibility for revisions as they occur, rather than once each year.

Advising materials are included in a single binder.

Disadvantages Initial cost for three-ring binders.

Preparation of the full set the first time is time-consuming.

Binders are larger and potentially less convenient to use.